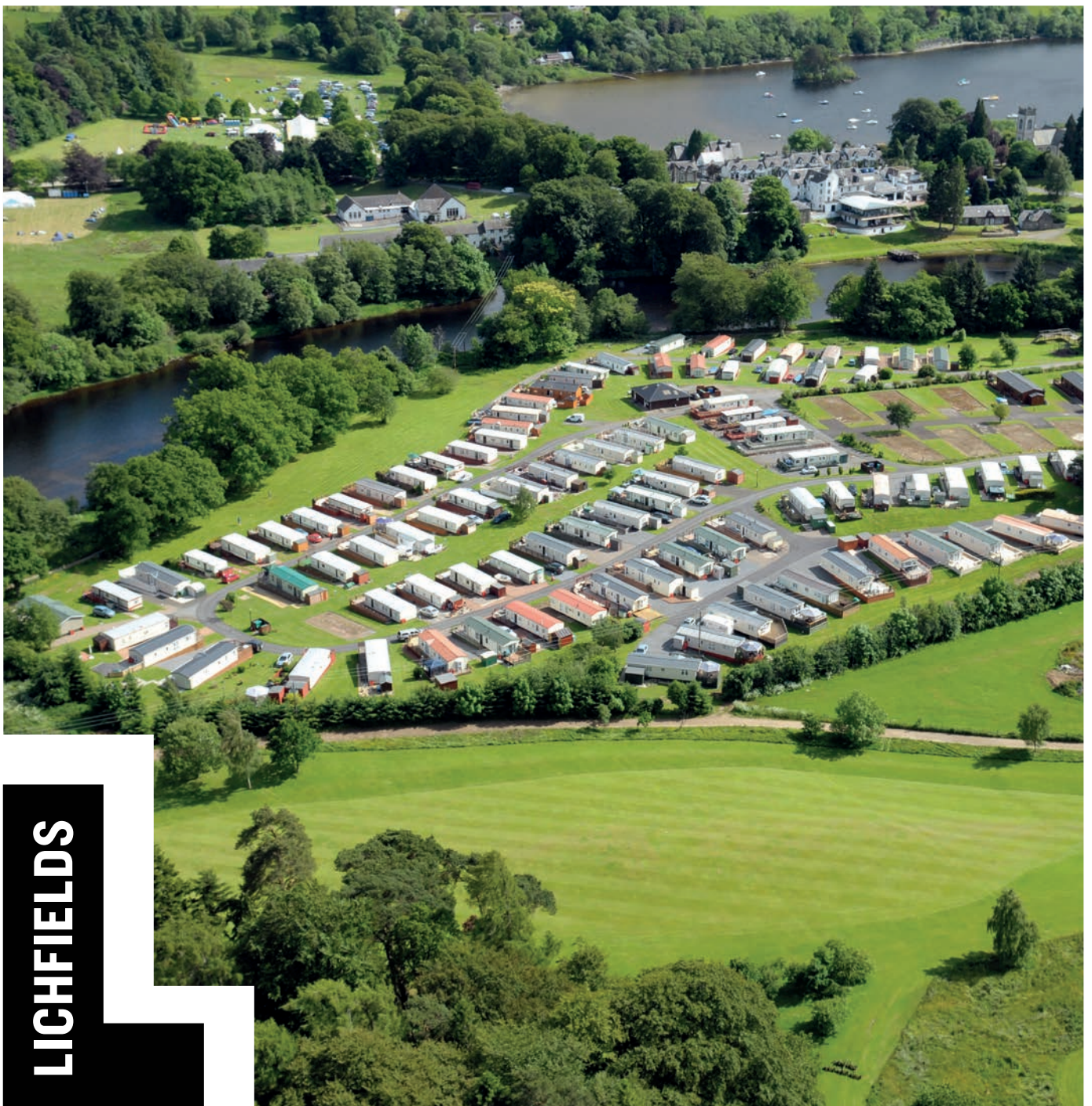


**INSIGHT**  
**JUNE 2017**

# Rural estates

Economic benefits of rural tourism



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# Executive summary

Rural estates are a mainstay of rural economies across Britain and it is important that they continue to thrive.

However, many rural estates face increasing financial pressures and are looking to reduce reliance upon traditional sources of income and explore opportunities for diversification.

While there is nothing new in rural diversification, increasing economic and political uncertainty arising from the recent decision to leave the European Union has created an imperative to explore new business opportunities.

Tourism provides obvious diversification opportunities, and the tourism sector is expected to continue to grow, driving increased demand for tourist accommodation and other tourist attractions and activities.

Planning plays a vital role in helping estates diversify their revenue streams and unlocking value. Not only can it secure longer term sustainability of estates in an ever-changing world, it provides beneficial impacts for individuals, communities and the economy as a whole.

Policy support for rural development is underpinned by an acknowledgement of the need to stimulate rural economies. It is important that these benefits are clearly articulated in promoting diversification schemes through the planning system.



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# Key figures

**1 in 5**

people in Britain live in rural areas

**20%**

of domestic trips in the UK during 2015 took place in rural areas

**630k**

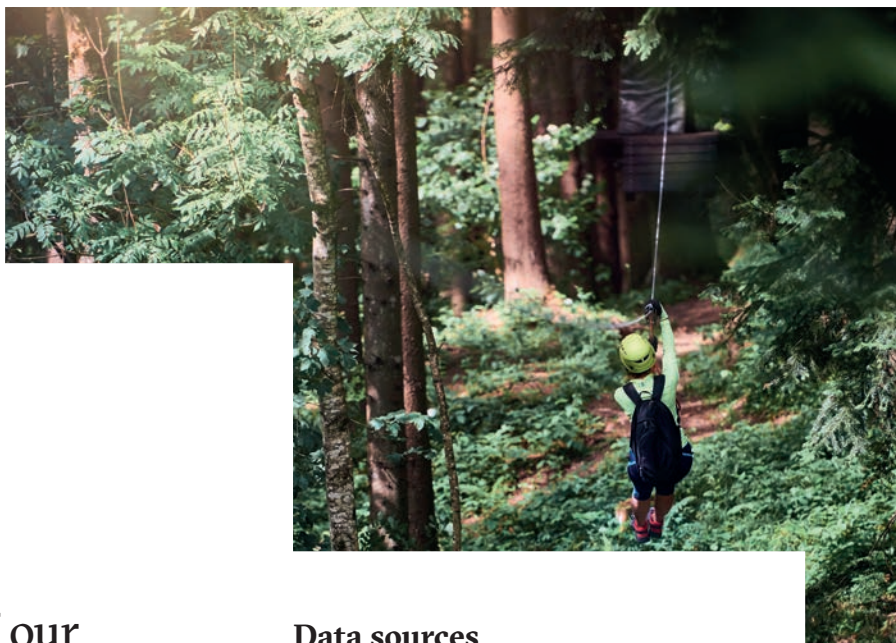
forecast growth in tourism jobs (2013-2025)

**£130bn**

forecast growth in the British tourism industry (2013-2025)

**35%**

of tourist expenditure accounted for by accommodation costs



# 01 Introduction

Across Britain, much of our landscape is rural, and much of that land is owned and operated by large estates. Such estates make important social, economic, and environmental contributions to society, and it is in the national interest to ensure that they are utilised effectively and to their full potential.

Rural diversification, and the exploration of new business streams and income streams, has become increasingly common over the last two or three decades and plays an important role in sustaining many rural estates.

The UK tourism industry is experiencing significant growth and rural tourism offers obvious opportunities for estate diversification. The recent drop in the value of the pound means that visiting the UK appeals to foreign visitors whilst 'staycations' are also on the rise.

While many tourists are drawn to our principal and historic cities, rural Britain also has much to offer and there continues to be scope for further rural tourism development.

This research considers recent and future growth in the tourist sector and then focuses in on the economic benefits of diversification into tourism, and in particular the benefits arising from the development of tourist accommodation and other associated tourist attractions and facilities. It then considers planning policy and how new development can be successfully promoted through the planning system.

## Data sources

In considering the economic benefits of tourism diversification, we have utilised data from the following sources:

- The GB Tourist Statistics (2015)
- VisitEngland
- VisitScotland
- VisitBritain
- Scottish Land & Estates
- Experian Business Strategies

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## 02 Challenging times

Rural estates contribute significantly to the prosperity of rural areas through investment in business activities and generation of employment opportunities. With nearly one in five people in Britain living in rural areas, it is important to ensure that our rural economies are thriving.

Data on the true extent and level of activity on estates is limited. Nevertheless, estates undeniably contribute significantly to the rural economy, including through farming, energy generation, sport and leisure activities and tourism. The success of estates offers significant spillover effects for the wider economy.

In addition to the economic benefits they bring, many rural estates are also of significant cultural and historic importance on a local, national and international scale.

However, rural land and estate owners and managers currently face uncertain times, particularly in the context of the recent decision to leave the European Union.

Once outside the EU and the single market, the UK will need to re-negotiate trading relationships and re-evaluate agricultural and rural development policies. Over the years and months ahead, estate managers will therefore need to keep a close eye on the changing political landscape and the emergence of a new policy context, which are likely to generate both opportunities and threats.

Even prior to the Brexit vote some traditional estate activities, such as farming and shooting were already under strain. There has been an increasing shift away from direct support for agricultural production under the EU Common Agricultural Policy and shooting rights across England and Scotland have recently become subject to significant limits and restrictions.

In Scotland, since the introduction of the Scottish Land Reform Act 2016, land management has come under particular scrutiny and this has resulted in a number of estate owners choosing to sell up and move on. Indeed, the average tenure of a Scottish estate owner is now less than twenty years. For those who choose to stay, it will be important to understand where diversification opportunities may lie and how such opportunities can be successfully pursued.



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# 03 Opportunities for diversification

In the face of the challenges highlighted, levels of confidence in relation to traditional land uses are declining. Landowners and estate managers are increasingly keen to explore the use of land in new and innovative ways, mindful that strategic asset diversification can help to provide a safeguard against economic and political uncertainties.

There is also a growing understanding that opening up rural estates to wider business opportunities allows new generations of land owners to utilise their skills and abilities, increasing the likelihood of estates being passed down through families.

There are many different forms of diversification open to landowners, each with individual benefits and their own advantages and disadvantages.

Obvious diversification opportunities include:

- energy generation, e.g. through wind, solar and hydro power
- caravan, camping and glamping uses
- hotel, guesthouse and other forms of tourist accommodation
- new build commercial and residential development
- conversion of existing buildings
- visitor attractions and other sports and leisure activities
- conference centres / wedding venues
- telecommunication bases

Aviemore provides a particularly interesting example of rural estate development. While it has long been a base for winter sports, an enterprise body, Aviemore and the Cairngorms Destination Management Ltd was formed around a decade ago with the express aim of developing the tourist market by broadening the range of tourist attractions and developing the town into a year-round resort.

There are now a vast number of tourism accommodation provisions available throughout the town, ranging from hotels, B&B accommodation, guesthouses, self-catering lodges and chalets and camping facilities, with four campsites in the local area.

Estates in Aviemore and the surrounding area, such as Strathspey Estate or Alvie & Dalraddy Estates are well known for providing country sports facilities, such as shooting, hunting and fishing. Other activities now available to tourists in the Aviemore area include:



Winter sports



Climbing



Biking



Breweries



Adventure park



Zip lining



Kayaking



Canoeing



Horse riding



Watersports



Quad biking



Golf



Wildlife tours

Aviemore has clearly been successful but has benefitted from obvious advantages in the form of being an established winter sports resort, and its location within the Cairngorms National Park.

It is important to recognise that tourism-related development will not necessarily be suitable for every location. Some rural estates may benefit greatly from a focus on other diversification opportunities such as renewable energy projects and housing development.

Clearly, different estates will have different assets and different infrastructure access – weighing up these factors will be crucial to determining which development to undertake. However, what is common across all development is the need to be clear on the objectives of the development; well planned and designed schemes and a strong economic underpinning to make its case.

The remainder of this report focuses in on tourism-related development, looking at past and future growth in the sector, and the economic benefits arising from the development of new tourist accommodation and other attractions and activities.



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# 04 Growth of the tourism market provides opportunities

Tourism has delivered significant employment growth in recent years. Between 2000 and 2016, the number of jobs in the sector increased by 29% in the UK. This was almost double the rate observed across the economy as a whole (16%)<sup>1</sup>.

The strong performance of the industry looks set to continue into the future. VisitBritain forecast that, between 2013 and 2025:

- an additional 630,000 tourism jobs will be created
- the economic value of the industry will increase from £126.9 billion to £257.4 billion

In addition, recent government initiatives such as Tourism Scotland 2020, Delivering a Golden Legacy and the Tourism Action Plan all anticipate growth within the tourism industry and present potential strategies to harness this opportunity.

As previously discussed, Brexit has led to a degree of uncertainty and a dampening of economic growth forecasts for the UK in the near term. For the UK tourism industry, however, the devaluation of sterling has created opportunities. Analysis undertaken by the House of Commons<sup>2</sup> indicates that a weaker pound has:

- increased the UK's appeal to foreign tourists, by reducing the cost of visiting
- increased the appeal to UK residents of a 'staycation' by driving up the cost of foreign holidays

Rural areas make an important contribution to the UK's tourism offer, consistently accounting for approximately 20% of domestic tourist trips between 2006 and 2015.

Looking to the future, the UK tourism industry is expected to continue to grow. This should drive additional demand for rural accommodation, provided that rural areas are able to maintain or increase their current market share. This is considered to be a realistic ambition, given the recent popularity of on-screen entertainment featuring rural landscapes and country homes, coupled with an increased awareness of the importance of our historic and scenic landscapes. Both factors have helped to promote rural tourism to an increasingly wide audience.

This presents an opportunity for rural estates to diversify through the development of tourist accommodation and other associated attractions and facilities.

By unlocking value from assets that may appear to have little development potential, such diversification can deliver significant economic benefits.



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**Between 2013 and 2025, the tourism industry in Britain is forecast to:**

Increase in value by

**£130bn**

Create

**630,000**

additional tourism jobs

<sup>1</sup> Experian Business Strategies, May 2017

<sup>2</sup> Potential effect of the UK leaving the EU on UK tourism, House of Commons Library Debate Pack, October 2016

# 05 Economic benefits of rural tourist accommodation

Highest spend on accommodation per night is in hotels/motels

£44

A variety of accommodation products are available to rural estates seeking to capture rising demand. No single approach represents a silver bullet in relation to rural diversification, however. Estate professionals must give careful consideration to which best fits with the specific circumstances of their land interests.

Such decisions will be informed by a range of issues including: the development potential of existing land and buildings; the quality and sensitivity of the landscape; the profile of likely visitors; and the scale and nature of existing local provision.

## Accommodation expenditure

The revenue generating potential of alternative forms of accommodation is also an important factor. Figure 1 considers this with respect to a number of popular accommodation types. It draws upon existing data regarding the average spend on accommodation per domestic tourist per night and the average length of each domestic stay. This information is based on tourism accommodation across all of Scotland and England, including urban areas. Nonetheless, it provides a broad understanding of the relative performance of each accommodation type and the general tone of accommodation charges.

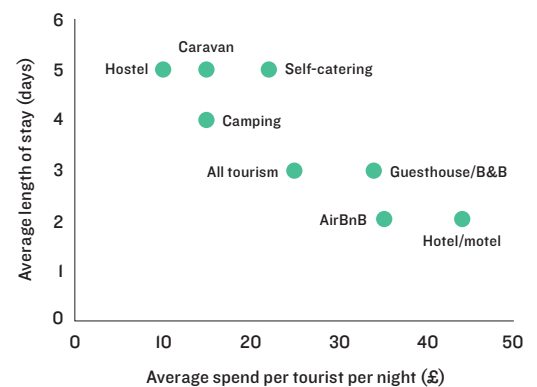
This highlights a negative correlation between the length of stay and the spend per tourist, with more expensive forms of accommodation generally characterised by shorter average stays and vice versa.

Average expenditure on accommodation (per person per night) is highest for those staying in: hotels and motels (£44); AirBnB properties (£35); and guesthouses and B&B accommodation (£34). The length of stay for these accommodation types is, however, relatively short (two or three nights on average).

In contrast, hostels (£10), caravans (£15) and self-catering properties (£22) are characterised by lower average levels of expenditure on accommodation. This is offset – at least in part – by longer average stays (approximately five nights).

It is important that rural estates seeking to diversify take this dynamic into account. For instance, locations with a wide variety of outdoor activities in the local area could hold more appeal for tourists seeking a longer break. In such circumstances, a lower cost accommodation offer, such as a hostel or campsite, may prove more successful than a hotel.

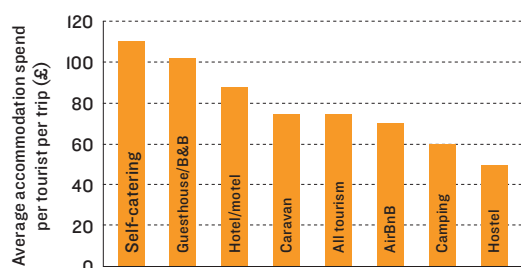
Figure 1: Average accommodation expenditure and length of stay (domestic tourists)



Source: The GB Tourist Statistics (2015)

Figure 2 draws this analysis together in order to calculate the average level of expenditure on accommodation per person per trip. It can be seen that this is highest in relation to self-catering properties (£110) and lowest with respect to hostels (£50).

Figure 2: Average accommodation expenditure per tourist per trip (domestic tourists)



Source: The GB Tourist Statistics (2015) / Lichfields analysis

## Scale of the market

Some forms of accommodation appeal to large numbers of tourists, whereas others are more niche. This affects the overall scale of the market that different products are likely to be able to compete for.

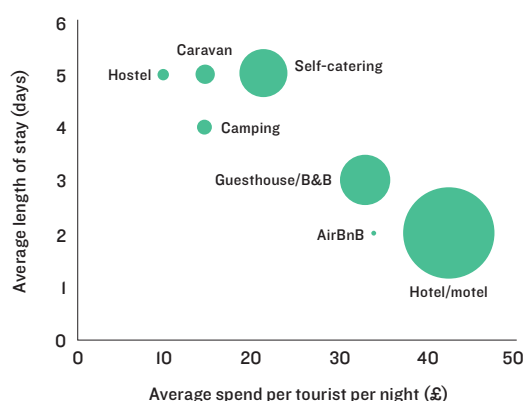
Data published by VisitScotland<sup>3</sup> indicates that the majority of tourists still favour traditional accommodation products such as hotels (40%), guesthouses/B&B accommodation (23%) and self-catering properties (23%). In total, these accounted for 86% of visitors to Scotland in 2015. Caravans (9%), camping (7%) and hostels (6%) accounted for comparatively modest proportions of visitors.

More recent trends in the tourist accommodation industry, such as AirBnB (3%) and glamping (1%) recorded the lowest share of visitors of all those considered by Lichfields.

Figure 3 combines an analysis of the scale of the market with average spend per night and length of stay data. This would appear to suggest that the greatest opportunities exist in relation to hotels/motels, guesthouses/B&B accommodation and self-catering properties. In reality, however, the situation is more complex and opportunities exist to deliver successful projects across the full range of accommodation types:

- the data presented in relation to market share represents a snapshot in time. Emerging accommodation products, such as glamping and AirBnB, may capture a greater proportion of demand in the coming years
- the tourism offer within the locality of a particular estate will play a significant part in determining which forms of accommodation have the highest prospects of success

Figure 3: Length of stay, average expenditure and market share by accommodation type (domestic tourists)



Source: The GB Tourist Statistics (2015) / VisitScotland / Lichfields analysis

86%

of tourists stay in hotels, guesthouses/B&B accommodation and self-catering properties

<sup>3</sup> Scotland Visitor Survey 2015, VisitScotland (March 2016)

Average 12 month occupancy rates vary from:

70%

for hotels; to

23%

for touring caravan and camping sites

## Occupancy and seasonality

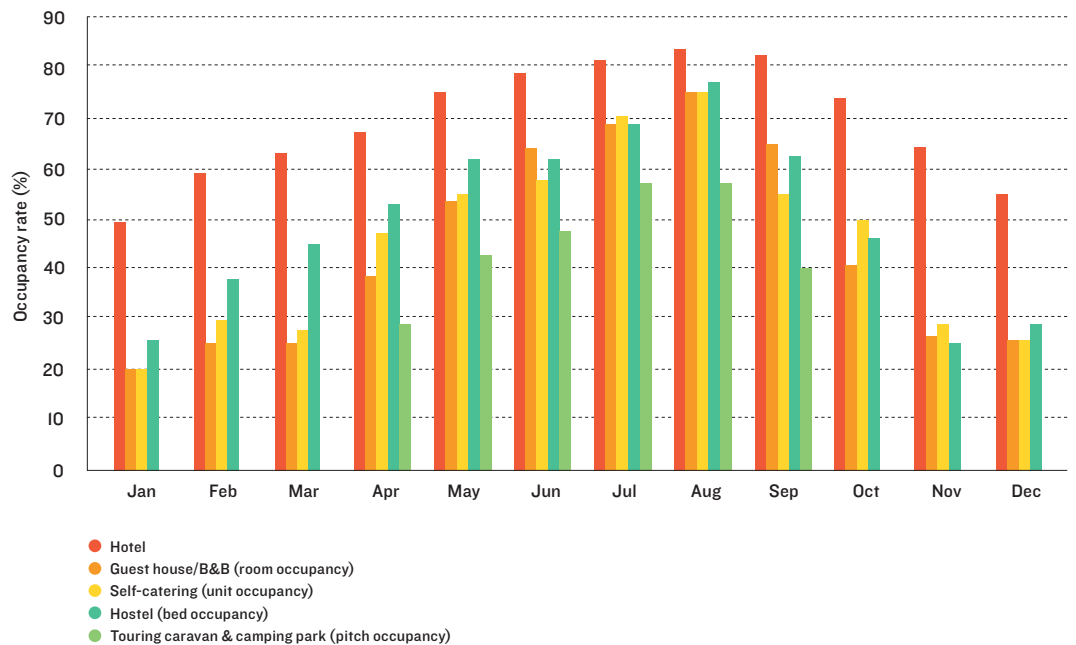
Seasonality of demand, and levels of occupancy, are also important factors in assessing the suitability of alternative forms of accommodation. Those that appeal to tourists throughout the year are likely to offer a more regular income stream, as well as the highest revenue generating potential. In some instances, however, year round activity may not be compatible with other uses on rural estates, such as game shooting.

Figure 4 considers monthly occupancy rates for a range of accommodation types. This highlights that:

- hotels consistently record the highest occupancy levels, peaking at 84% and averaging 70% over the course of the year

- occupancy levels achieved by guesthouses/B&B accommodation, hostels and self-catering properties are broadly comparable, averaging between 45% and 50% over a 12 month period
- the gap between occupancy rates for hotels and those of guesthouses/B&B accommodation, hostels and self-catering properties narrows considerably during the peak months. However, the performance of hotels is much stronger out of season, with average monthly occupancy never dropping below 49%
- touring caravan and camping sites are the most seasonal forms of accommodation. Data suggests that the majority of sites only operate between April and September. Smoothing out visitor numbers over a 12 month period, this translates to an average annual occupancy of just 23%

Figure 4: Monthly occupancy rates by accommodation type



Source: VisitScotland

## Potential revenues

It is possible, by drawing together the preceding analysis to compare the revenue generating potential of each accommodation product. The analysis presented in Figure 5 does so by assessing the impact of a notional 50 bedspace scheme for each.

It is acknowledged that this scale of provision will be more appropriate for some forms of accommodation than others. For the purposes of this exercise, however, a uniform level of capacity has been assumed in order to compare the impacts of each on a consistent basis.

This indicates that the provision of hotel/motel accommodation offers the highest annual revenue potential per bedspace. The delivery of capacity for 50 guests, for instance, could be expected to generate more than £560,000 per annum. This is before any additional on-site expenditure has been taken into account.

This needs to be considered, however, within the context of the high capital and running costs associated with hotel developments (including wages). Even a budget or limited service hotel, for instance, is likely to require 1 full-time member of staff for every 5 bedrooms<sup>4</sup>.

AirBnB properties (£287,000), guesthouses/B&B accommodation (£285,000) and self-catering properties (£181,000) all offer moderate annual revenue potential, albeit with substantially reduced staffing and running costs in comparison with hotels.








In addition, AirBnB and self-catering properties perhaps offer greater potential to be delivered incrementally, and at a smaller scale, through the conversion of redundant outbuildings. This may be viewed, by estate owners with limited relevant experience, as a lower risk, and more attractive option than the development of hotel accommodation.

The development of campsites and pitches for touring caravans represent the diversification opportunities that offer the lowest annual returns per bedspace. They are also, however, likely to be subject to the lowest start-up and staffing costs. In addition, they can be low impact in land use terms, allowing estate owners to work around the limits of their land and the existing fabric of the estate.

Provision of this nature can, therefore, be well-suited to those estate owners looking to 'dip their toe' into the tourist accommodation market, without having to make a significant long term commitment.

<sup>4</sup> Employment Density Guide, 3rd Edition, Homes and Communities Agency, November 2015

Figure 5: Potential revenue impacts of 50 bedspaces by accommodation type

	 <b>Hotel/ motel</b>	 <b>Guesthouse/ B&amp;B</b>	 <b>Caravan</b>	 <b>Camping</b>	 <b>Self- catering</b>	 <b>AirBnB</b>	 <b>Hostel</b>
<b>Average spend on accommodation per domestic tourist per night</b>	£44	£34	£15	£15	£22	£35	£10
<b>Maximum annual potential revenue (100% occupancy)</b>	£803,000	£620,500	£273,750	£273,750	£401,500	£638,750	£182,500
<b>Average annual occupancy</b>	70%	46%	23%	23%	45%	45%	50%
<b>Estimated annual revenue (accommodation only)</b>	£562,100	£285,430	£62,963	£62,963	£180,675	£287,438	£91,250

Source: Lichfields analysis

# 06

## The benefits of a broader visitor offer

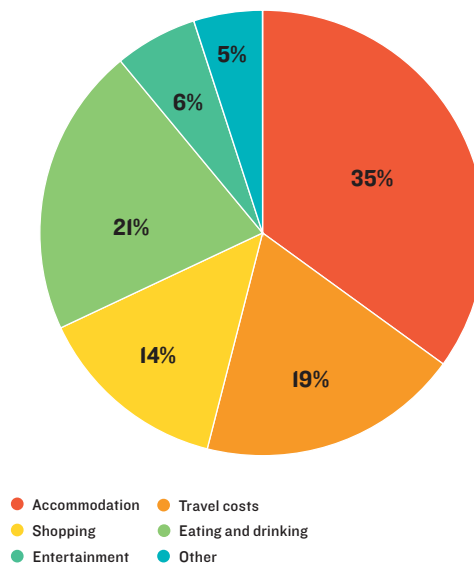
Those rural estates that are able to offer a broad range of complementary activities will generally be better positioned to maximise the benefits of diversification.

The development of tourist accommodation provides an opportunity to generate additional revenue streams. However, accommodation costs typically account for just 35% of a tourist's total expenditure. Figure 6 provides a breakdown of total tourism expenditure, by type.

Assuming that accommodation costs consistently account for 35% of tourist expenditure, and applying this to the potential revenue figures presented in Section 5, it is estimated that the delivery of 50 hotel bedspaces could generate total expenditure of £1.6m per annum. This includes £337,000 on food and drink, £225,000 on shopping and £96,000 on entertainment. AirBnB properties (£821,000), guesthouses/B&B accommodation (£815,000) and self-catering properties (£516,000) also offer the potential to deliver significant levels of total tourist expenditure.

The proportion of this wider expenditure which is captured by rural estates will ultimately depend upon the extent to which additional, complementary uses are provided on-site alongside tourism accommodation.

Figure 6: Breakdown of tourist expenditure



Source: The GB Tourist Statistics (2015)

By offering tourist accommodation alongside leisure pursuits and a strong food and drink offer, for instance, estates are able to:

- maximise the proportion of visitor expenditure retained within the estate
- strengthen the appeal of the estate as a 'destination' thereby helping to increase demand for bedspaces on-site and encourage visitors to stay for longer
- increase the number of day visitors attracted to the estate through the provision of a more rounded tourism offer

It may not be practical for some smaller estates to provide a broader range of activities as described above. In such circumstances, it is important that opportunities for collaboration and partnership working with other local attractions are explored. Such approaches can be beneficial for all parties by helping to: retain off-site visitor expenditure within the local economy; and increase demand for on-site accommodation by raising the profile of the wider area as a tourist location.

### Case study: Hesleyside Hall

A Grade II listed Country House in Northumberland, Hesleyside Hall has funded significant conservation and upgrade work in recent years. In part, this has been achieved through revenues generated via a range of successful diversification projects, which demonstrate both the benefits of providing a range of facilities on-site and the merits of partnership working with local facilities.

The estate provides luxury B&B accommodation within the Hall, as well as a small 'glamping site' which broadens its potential market reach. Visitors have the opportunity to undertake a range of activities on-site or nearby during their stay, including: off-road mountain biking; fishing; sailing; and kayaking. The estate also promotes a range of key tourist attractions in the local area, such as: Alnwick Garden; Kielder Observatory; and Go Ape.



# 07 Unlocking value through planning

Undertaking long-term, sustainable projects requires comprehensive planning to unlock value. While planning may appear to be a major hurdle, the best plans take into account a wide range of competing interests and provide value. Indeed, in a plan-led system for development, there is policy support for rural development within both the English and Scottish planning systems.

In England, the National Planning Policy Framework (NPPF) (2012) highlights that planning policies should 'support rural tourism and leisure developments that benefit business in rural areas, communities and visitors, and which respect the character of the countryside' (Page 9, Para 28).

In Scotland, National Planning Policy Framework 3 (2014) promotes 'sustainable and economically active rural areas' (Page 2, Para 1.5) and identifies tourism and food and drink as key economic sectors.

Furthermore, in March 2016 the Scottish Government issued draft advice to support policy in Scottish Planning Policy (2014) on the need for planning decision-makers to give due weight to net economic benefit. This guidance makes clear that the net economic benefit generated by a proposed development may be a material consideration in the planning decision-making process.

The key thread running through planning policy guidance in England and Scotland is the importance of economic factors, and the need to evidence net economic benefit from proposals. Tourism-related developments on rural estates offer the potential to deliver a range of positive economic outcomes, including:

- creating new employment opportunities for local residents both on-site and in the wider economy
- stimulating demand for existing tourism assets in the local area
- increasing the overall value of rural economies
- creating additional business rates revenue for local authorities, which can be reinvested in the local community

It is important that these impacts are robustly evidenced in order to maximise their ability to influence the decision-making process.

## Case study: The Forbidden Corner

The Forbidden Corner is an unusual family friendly visitor attraction on the Tupgill Park Estate in the Yorkshire Dales National Park. Comprising of labyrinths, towers and underground mazes, it was originally developed as a private folly and opened to the public in 1994 due to growing demand. It attracts up to 80,000 visitors a year (with admission prices of £10-£12) and has won multiple awards, including 'Best Large Visitor Attraction' at the 2015 White Rose Awards.

The Forbidden Corner's success has helped to increase visitor numbers across the estate and drive a range of additional diversification projects, including the development of: a café; a restaurant with rooms; and self-catering cottages.

The benefits to the estate and the local economy could, however, have been lost in the late 1990's. As the site's popularity and profile increased, the local Council became aware that planning permission had not been sought to open the garden to the public. A retrospective planning application was submitted and refused, leaving the attraction facing closure. Eventually, however planning permission was granted at appeal.

The experience of the Forbidden Corner highlights the complexities of promoting recreational opportunities in sensitive rural areas, and the need to ensure that the planning process is managed effectively.



Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development.

**NPPF, para 28**



A sustainable, economically active rural area, which attracts investment and supports vibrant, growing communities, is essential to our vision.

**NPF3, page 2, para 1.6**

# 08 Conclusions

Diversification is extremely important for virtually every business. It ensures a wide range of opportunities can be taken while mitigating future risks as political priorities, trends and ideas change.

Rural estates are facing what many other sectors have faced as these factors have shifted over time. Changing approaches in relation to land ownership in Scotland and the uncertainty the country faces as Brexit negotiations continue mean that rural estates may need to diversify their activities in order to survive. Nevertheless, despite this uncertainty, rural estates have a great opportunity to diversify their revenue stream, provide sustainability to the estate and boost the local economy.

There are a range of options open to rural estates, be it renewable energy, housing development or tourism, to name a few – different estates will have different priorities and opportunities. However, tourism may be the low-hanging fruit for development which can provide significant financial benefits.

Different estates will have different tourism assets within their proximity and different access to infrastructure. These factors, amongst others, should shape the tourism offer on the estate – some places may be better suited to self-catering holiday options while others may be better suited to camping development. Regardless of the type of development, there are key fundamentals that are common to every project.

In particular, it is vital that any scheme is well planned – taking into account a range of competing priorities – and that the economic benefits to the estate and the wider area are clearly evidenced and communicated. This will help to ensure that the vision for the estate is shared by the local community. Indeed, good planning will unlock value, provide greater stability and boost the local economy.

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What makes us different? We're not just independent but independent-minded. We're always prepared to take a view. But we always do that for the right reasons – we want to help our clients make the best possible decisions.

We have an energetic entrepreneurial culture that means we can respond quickly and intelligently to change, and our distinctive collaborative approach brings together all the different disciplines to work faster, smarter, and harder on our clients' behalf.

## Sharing our knowledge

We are a leading voice in the development industry, and no-one is better connected across the sector. We work closely with government and leading business and property organisations, sharing our knowledge and helping to shape policy for the future.

## Publishing market intelligence

We are at the forefront of market analysis and we track government policy and legislation so we can give fresh insight to our clients. Our Think Tank is a catalyst for industry-leading thinking on planning and development.

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Measuring the economic impact of corporate activities

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