

ASPECTS OF LEISURE

AUTUMN/WINTER 2023

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INTRO

Welcome to the Autumn/Winter edition of Aspects Leisure 2023.

Although the UK currently looks likely to avoid a recession in 2023, latest figures from ONS suggest that two thirds of adults (67%) in Great Britain are spending less on non-essentials because of the rise of cost of living. Whilst inevitably this will impact leisure markets, boosts to average pay in recent months, coupled with the recent reduction in inflation means that real wages are beginning to improve. Previous periods of economic turbulence have shown that experiences are favoured over goods and in particular that a flight to quality is likely, with spending undertaken more carefully and less often.

In this edition we take a look across some of the core leisure markets, including: holiday parks, visitor attractions, pubs and hotels. We are delighted to include articles from colleagues in our Energy and Automotive teams with articles on Biodiversity Net Gain (BNG) and Electric Vehicles (EV).

Whether it's a holiday park moving to a hybrid operational structure (ownership and hire fleet), a visitor attraction focussing on more effective use of space and longer dwell time, a golf course seeking permission for holiday lodges, or a garden centre installing EV charge points - diversification and openness to change is key to surviving the current turbulence. We think you will find something of interest here.



Ian Simpson
Head of Department

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HOLIDAY PARKS	//	04
VISITOR ATTRACTIONS	//	05
PLANNING	//	06
BIODIVERSITY NET GAIN	//	08
EV AND GARDEN CENTRES	//	10
PUBS	//	12
HOTELS	//	13
REGULATIONS	//	14





HOLIDAY PARKS

A testing period

Following the strongest trading period on record provided by a pronounced bounce following the pandemic, the current downward trend in the economic cycle is once again **testing the resilience of the holiday park sector** and its defensive qualities.

From an operational perspective, **the major operators are reporting a marked slowdown in caravan and lodge sales**, particularly for luxury and mid-market products; demand for budget models has remained relatively stable albeit not as strong as previous years. **Previous supply chain issues are being reversed** and the slowdown in sales has led to most manufacturers of caravan and lodge products having stock in hand.

In response to fewer sales of holiday units, **many operators have reverted to a mixed operational model**, increasing the size of their hire fleet (holiday lets). **Encouragingly, operators are reporting occupancy levels being sustained in line with pre-pandemic levels** although bookings for letting caravans and lodges have become more last minute.

There is little doubt that the appetite to acquire parks remains; however, many institutional backed buyers of holiday parks, which dominated the marketplace from the beginning of 2021 until mid-2022, have withdrawn temporarily from the market. In the last year the transactional market has been dominated by independent operators acquiring individual sites or smaller groups. **Overall the quantum of transactions has, at least until recently, remained relatively constant** but due to the smaller lot sizes, overall investment volumes are down on 2021 levels.

Latterly, cautiousness from buyers has started to manifest itself and protracted transactions and a reluctance to commit has become more common, especially where bank funding is required. Vendors are slowly adjusting to the recent transformation to a 'Buyer's market' and there is now some evidence that purchasers in cash positions have been able to acquire sites at more favourable prices when compared to the same time last year. **The more cautious outlook stems from the Bank of England's successive interest rate hikes which at the time of writing stood at 5.25%.**

The parks coming to the market have until very recently been largely driven by personal circumstance such as retirement sales although the ongoing cashflow difficulties of one of the largest groups forcing administration of part of its portfolio will undoubtedly have a short term effect on the market. **For the moment, many operators with premium holiday parks are choosing to focus on asset managing their existing portfolios** in the form of selective capital expenditure programmes and cost base control.

On a more positive front, recent figures suggest that inflation has started to wane, with the hope that this will translate to increased levels of consumer confidence. Once interest rates have peaked and then start to come down, the lower cost and greater availability of debt may also help fuel an increase in transactional activity. **There is, without doubt, a wall of institutional capital that remains hugely attracted to the defensive qualities of the sector with many investors expected to go into acquisition mode, as soon as wider market conditions start to ease.**



VISITOR ATTRACTIONS

Looking beyond Covid-19

2022 was a strong year for the UK visitor attraction sector, as the country continued its recovery from the Covid-19 pandemic. However this was achieved amidst geopolitical turbulence, rising inflation, rising costs of energy, and a cost-of-living crisis. Not only that but **competing national events** tend to reduce footfall to visitor attractions and 2022 featured the Commonwealth Games, the Platinum Jubilee, the state funeral, and this was followed by the coronation in early 2023.

Although the **UK currently looks likely to avoid a recession in 2023**, there is squeeze on discretionary spend with customers giving more **thought to value for money**, being cautious about spending, and looking for deals, with an uptick in demand for free visitor attractions. Key findings from the 2022 Visit Britain Survey include:

- **42% increase** in total visits to visitor attractions from 2021 to 2022, but still 35% lower than 2019.
- **Admission fees increased** at the rate of inflation when the increases were set.
- **69% of attractions** have been affected by increased supplier costs, 64% by rising energy, and 51% by higher wages.
- **Gross revenue** across the sector increased by 29% in 2022 from 2021.
- **The trend of pre-booking** continues to be popular with 71% of attractions offering it.
- **Over the last year** there has been a net increase for all types of staff, in particular unpaid volunteers in 2022.
- **In 2022**, 1% of English attractions reported a permanent closure, and 3% reported a temporary closure.

Whilst rising operational costs and consumers' reduced disposable income are reasons to be cautious, **increasing visitor numbers and growth in gross revenue offer comfort for the sector.**

Moving forward, diversification is key to a visitor attractions' success, especially with the growth of competition for visitor spend. Diversification should consider the **effective use of space and initiatives** to encourage visitors to stay longer and spend more on site. Accommodation often in the form of caravans, lodges or camping can offer a viable diversification option. **Adding on site accommodation can also increase an attraction's catchment.**

As consumers become more aware of the **importance of sustainability**, many attractions are taking steps to improve their environmental credentials. Over recent years **electric vehicles** have become more common, with the UK government pledging to stop the sale of new petrol and diesel cars by 2030. Visitor attractions should consider adding **EV charging points** if they haven't already. Electric vehicle charging points can also encourage visitors to stay at attractions for longer, with the potential to draw new customers in. The Eden Project in Cornwall for example has installed **twenty 22Kw fast chargers in 2022**, with an additional 12 ports later installed for their own electric vehicles.

In terms of the market for visitor attractions, buyers are representative of those in the wider leisure market, being more cautious than they were 12-18 months ago due to the economic landscape. **In general, buyers are corporate as cost tends to be a deterrent to individuals entering the market.**

Overall the outlook looks bright for the visitor attraction operator notwithstanding current headwinds.



Golf Course Diversification: Holiday Lodges

The game of golf became even more popular during the pandemic as people sought the benefits of fresh air, exercise and open space. The abundance of golf courses throughout the UK made the industry ideally placed to service this demand and, at the same time, for our clients to think about their overall golf 'offer' and the diversification of the golf course industry.

Additional uses at established golf clubs often seek to make the most of existing clubhouses and supporting buildings (for example, weddings and events) but holiday accommodation on golf courses is also now a popular diversification option which can generate lucrative additional income streams.

As a result, we have seen more enquires for supporting holiday accommodation on golf courses and are often asked to provide our specialist planning advice to clients. Holiday lodge proposal on golf courses are very popular, however viability is critical when taking this type of project forward. Our advice is to think about the following areas:

Location

Holiday lodges located near to existing clubhouses and facilities are usually the most practical option. This is due to convenient access to existing site services (gas, electricity, water), infrastructure (access and car parking) and supporting facilities (reception, bar, restaurant) which are all vital components to support any form of visitor accommodation.

Whilst more remote areas on a golf course may be more desirable due to their attractive setting, this sometimes raises practical issues in terms of providing suitable connectivity to the main site facilities and/or the cost associated with new facilities; the latter being costly if the development

is located away from existing services.

Phasing

If planning permission is obtained, consider a sensible phasing strategy for your holiday lodge development. It is often better to develop initial phases of, say, 8-10 lodges at a time, rather than to provide the infrastructure for the whole development project on day one and then try and sell/rent holiday lodges with ongoing building work taking place.

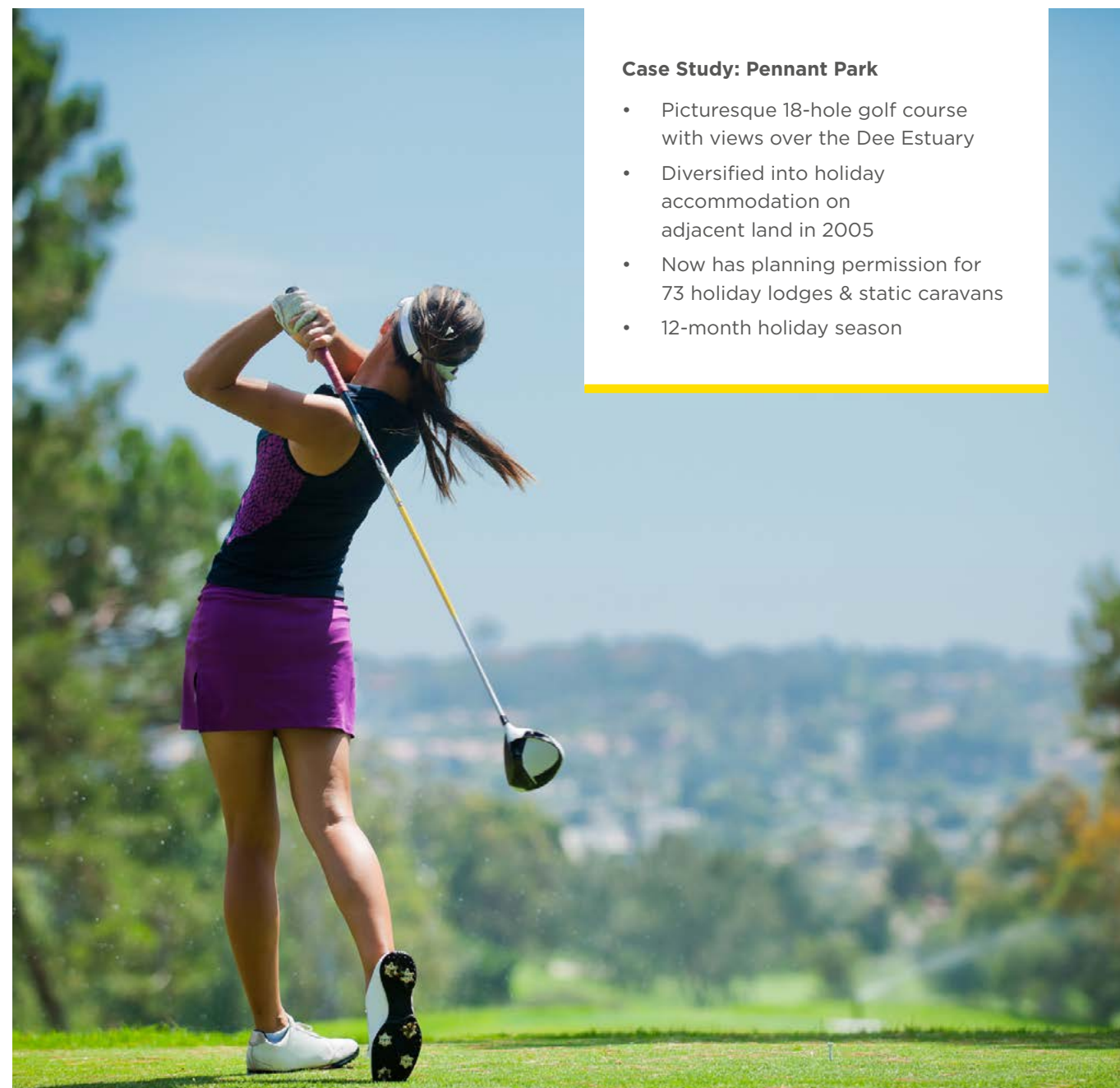
Consider providing all of the landscaping at year one so that when the future phases of your holiday lodge development are approaching completion, they will benefit from better on-site screening giving a sense of enclosure and exclusivity for visitors staying on site.

Business Model and Cost

When obtaining a planning permission for holiday lodges to support a golf course business, the most common business model is to sell an element of the lodges (usually through licence agreements) in order to recoup some of the initial capital expenditure during the early operational phases. It is often the case, however, that a business model mix is required for both owner-occupied holiday lodges and lodges that are available for holiday rental (either as independent holiday accommodation rental or to support ongoing events such as weddings).

The typical cost for providing the concrete base and connections to services for a holiday lodge is in the region of £30,000 per unit. Then one must consider the cost of the lodge itself and other indirect costs such as marketing material. In this sense it is important to have a solid viability appraisal with accurate cash flow predictions prior to obtaining planning.

At Savills we expect the popularity of alternative forms of holiday accommodation on golf courses to continue and we are well placed to provide expert planning advice to golf operators on this type of diversification project. Below is an example of where we have secured this type of planning permission for our clients:



Case Study: Pennant Park

- Picturesque 18-hole golf course with views over the Dee Estuary
- Diversified into holiday accommodation on adjacent land in 2005
- Now has planning permission for 73 holiday lodges & static caravans
- 12-month holiday season



Biodiversity Net Gain (BNG) can be understood as development that leaves biodiversity in a measurably better state than before.

BNG affects all town and country planning act developments in England and was introduced as a concept in the Environment Act 2021. BNG will become law following the implementation of secondary legislation anticipated in November 2023. BNG will not apply for 'small sites' – nine development units or less or 0.9 hectares or less until April 2024. Nationally Significant Infrastructure Projects will also only be affected by BNG from 2025.

What does this mean for development?

BNG means that all new developments will have to provide a biodiversity gain plan with their planning application detailing how the 10% uplift will be delivered. BNG can be delivered in three ways:

- **On-site:** Where a 10% uplift in BNG is delivered solely within the red line boundary of the development
- **Off-site:** Where the required number of BNG units is sourced from a local 'habitat bank' or 'donor site' for a price agreed between the landowner and developer to satisfy the 10% uplift.
- **Statutory credits:** This is a last resort and should only be implemented if BNG cannot be delivered through on-site and off-site measures. Developers can submit payments to the government which will be diverted into local government biodiversity projects.

Statutory credits have been priced so as to disincentivise their use and to stimulate the off-site BNG market place.

BNG will be calculated using the most recent version of DEFRA's Biodiversity Metric, currently version 4.0. This will be used across England to quantify habitat loss and gain.

Should BNG units be purchased from an off-site provider, the provider is agreeing to manage the site in accordance with a pre-agreed management plan for 30-years – the minimum length of a BNG agreement.

A biodiversity gain plan will also show how the mitigation hierarchy has been followed for the development site:

1. **Avoid:** Any negative impact where possible
2. **Minimise:** detrimental onsite measures that cannot be avoided
3. **Restore:** areas within the development for biodiversity enhancements – this can contribute to on site BNG
4. **Offset:** should additional biodiversity be required following restoration, BNG should be sought locally in order to satisfy the 10% net gain obligation



Often delivering BNG on-site is not always possible and can put strains on housing density and therefore financial viability for a development. Consequently, off-site BNG units can provide a means of complying with requirements whilst enabling development.

How Does this Affect Tourism, Leisure and Events?

BNG presents a manageable hurdle to the TLE sector whilst benefitting the environment.

New development, if over the threshold area, will have to deliver a 10% uplift in biodiversity net gain, which may present additional cost for the project developer. However, with sound planning advice BNG can often be delivered within the development site. If diversification or change of use is planned so as to result in an uplift in biodiversity, this should be quantifiable so as to satisfy local developer BNG obligations.

For example

A golf course looking to decommission and rewild as part of a wider project of creating a health retreat would be able to measure their existing biodiversity levels as a golf course, quantified as BNG units. Following this, the proposed rewilded habitat can also be measured and the increase in BNG units is then measurable against any diminution in biodiversity from the planned development.

The BNG Market

The immediate market for an off-site BNG unit provider is within the same Local Planning Authority (LPA). BNG units can be sold to neighbouring LPAs and ones further afield, but a reduction factor is placed on these units of 25% and 50% respectively. The purchaser of these units has to make up the difference by purchasing enough BNG units to satisfy the additional requirement. This is to incentivise local delivery.

BNG unit values vary subject to the habitat that is being traded. There are currently few comparables to use, but values look to range from £20,000 to £30,000 per medium distinctiveness BNG unit, with geographic variation. The BNG market works on a supply and demand model, leading to a wider range of prices for increasingly rare habitats.

ELECTRIC VEHICLE AND GARDEN CENTRES

Garden Centres – the perfect EV charging hubs?

15,000 vehicles passing daily, wifi, coffee, and toilets. If you can establish an 800 KVA power connection at a site with these criteria, then you can establish a successful electric vehicle charging hub. More often than not, Garden Centres are there or thereabouts.

When was the last time you planned where you are going to fill your car up with petrol? Consciously thinking about refuelling your internal combustion engine vehicle ultimately comes down to the cost of petrol and diesel. It is not a case of where or when, drivers are confident they are always in the vicinity of a petrol filling station and they know there will be a pump available immediately or within five minutes of arrival.

Presently, zero emission mobility is a little trickier. If you drive a Battery Electric Vehicle (BEV), you are in the 5% minority of the 34 million cars navigating the UK road networks and you may need to plan more meticulously. According to Which?, 74% of those using public charging infrastructure are dissatisfied and 48% of drivers express difficulty in finding a functional charging point. To facilitate growth, the UK government estimates that tenfold expansion will be required by 2030 with 300,000 public charging locations needed.

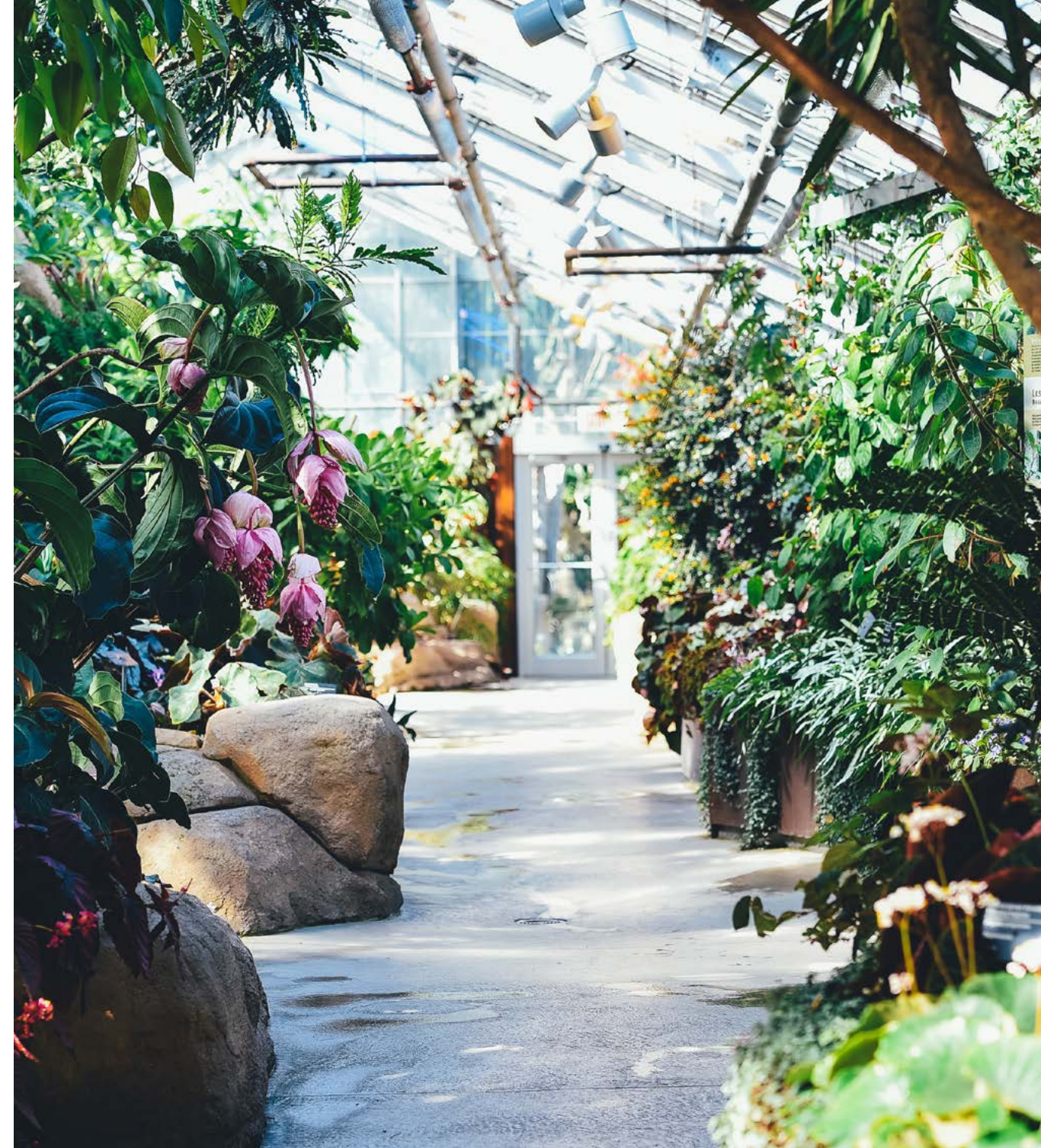
There is desperate need for real estate for electric vehicle charging, and Garden Centre car parks can generally meet the required criteria.

How can landlords benefit?

Returns are increasing and are often location dependent but rents paid by EV charging point developer operators (CPOs) are currently tending to range between £2,000–£4,000 per charger per annum

in rental income typically for a term of 20–25 years. In addition is an index linked rent review often cap and collared at 1–3%. This is a drastic improvement on earlier returns a couple of years ago, and there is evidence of some rents reaching £5,000 per charger per annum in strong locations. Over the term of the lease, landlords could expect a return between £900,000 and £1,250,000 for 8–15 car parking spaces (EV charging points generally take up four car parking spaces for every three chargers).

Other lease structures exist. For instance some CPOs offer a base rent of £1,000–£1,500 per annum per charger with index linked 1–3% review, plus a 10–15% gross profit share. Whether this option will be more beneficial to a landlord requires an assessment of the business. According to a market leading CPO Osprey Charging Network, charging hubs achieve 14 charges per charger per day on average, although performance data suggests that the best sites are achieving 20 charges per charger per day. The CPO turns over between £9–£19 per charge based off the sale of electricity. In order to calculate the gross profit, the CPO would subtract the cost of installation the electricity from the DNO plus initial installation and upgrade costs and minor operating costs such as customer payment software. Whilst landlords therefore absorb some of the performance-based risk, where the CPO has an annual turnover of over £1 million per site, this could be a more fruitful structure for them – and as the EV market expands so more strongly performing sites will emerge.



Other key benefits to landlords from providing a charging site in their car park include an upgraded site power capacity at virtually zero cost to the landlord, as well as increased footfall to their site, generating “new to industry facilities” revenue from the supporting amenities. Norway is a mature EV market and is estimated to be five years ahead of the UK market. Research and evidence suggest that on Norwegian retail park schemes with EV charging hubs footfall has increased by 200 visitors

per day. Moreover, if a landlord owns development land and are looking to build out a scheme, local authorities will now often require EV charging in order to obtain planning consent, and by introducing a CPO, developers can obtain this element at minimal cost. Further, EV charging points add undoubted environmental, social and governance (ESG) credentials to a property with a contribution towards carbon zero enhancing marketability and value.

Something to consider for Garden Centre landlords?



PUBS

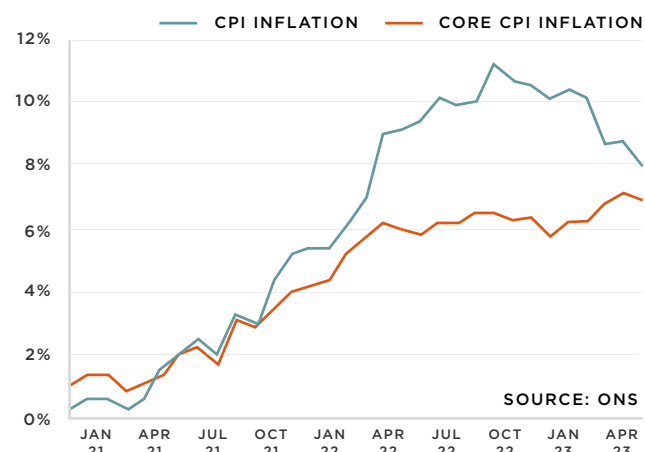
Has the economic hangover cleared for the sector?

Undeniably, **the pub market has experienced a turbulent past few years.** Following the Covid-19 pandemic and more recently the war in Ukraine, pub operators have encountered intense inflationary pressures, **the cost of living crisis, increasing energy bills, labour shortages, rising interest rates, industrial action affecting travel, and supply chain disruptions.** The culmination of all these challenges has helped result in the closure of 153 pubs within England and Wales in the first three months (Q1) of 2023 after approximately 386 pubs within England and Wales shut their doors for good in 2022. However, **what does the future hold for the pub market?** Despite the current economic climate, there are **signs of potential optimism within the sector.**

According to HSBC market analysts, **pub operators outperformed expectations** over Q1 and Q2 of this year with improving consumer demand within the sector.

UK inflation rate is dropping, will it continue to fall?

The most recent fall in the UK inflation rate will **relieve some of the financial pressure on UK consumers** and increase consumer confidence within the pub sector notwithstanding that higher input costs and elevated staff wages have forced UK pub operators to **increase their food and drinks prices to retain profit margins.** According to the Office for National Statistics (ONS), the **price of lager in UK pubs had risen by 11% in the 12 months** leading to June 2023 due to inflated operating costs.



However, the Bank of England has predicted the inflation rate will drop to 5% by the end of 2023 which provides some optimism to British pub operators concerning the sector's cost outlook – and the reduced inflation rate should lead to lower interest rates in the medium to long term and hopefully encourage buyers within the pub market.

Reductions in pub rateable values (RVs)

Following the 2023 business rates revaluation in April, the rateable values set within the UK hospitality sector generally reduced the rates liability for UK pubs.

There has been an average decrease of 17% in rateable values across the UK pub sector following the 2023 revaluation, which will reduce these costs to UK pub operators until the next revaluation in 2026.

UK pubs adapting to changing consumer preferences

According to UK pub industry reports, younger consumers tend to drink less than their older counterparts and the importance of soft drinks has never been higher within the sector. Also, more contemporary pub customers are conscious about health and wellbeing and their impact on the environment. There is an increasing demand for on-trend, creative flavours provided by sustainable brands that use high quality, low calorie ingredients. While soft drinks are not the most profitable beverages in a British pub, simple non-alcoholic cocktails ('mocktails') possess a much higher profit margin.

Although sales volumes are down in comparison to pre-pandemic levels, sales growth has been driven by higher prices and seizing these consumer market opportunities to challenge rising costs. However, UK pubs need to continue adapting and diversifying their offerings to meet changing customer expectations and remain appealing to the wide variety of UK consumers.



HOTELS

A Strong Recovery

The big story on the operational side has been the speed of recovery in Revenue per Available Room (RevPAR), driven by a strong uplift in average daily rates (ADR). **The UK regions led the initial recovery, fuelled by strong 'staycation' performance in 2021 and 2022.** The upward trend in ADR has continued into 2023, and London has seen its **performance accelerate** as international arrivals return. London Hotel RevPAR for the first five months of 2023 was 21.6% above the equivalent period in 2019, driven by a 28.0% increase in ADR.

Overall, we believe that ADR's have reached a new normal and it is becoming much **less likely there will be a correction to pre-Covid levels.** The current levels are being underpinned by the **strength of demand**, which has accelerated post pandemic, despite the squeeze placed on real disposable incomes. This is because **households are prioritising holiday (experience) spend**, supported in part by excess savings.

Operating costs and profit margins have been under pressure since post pandemic reopening due to the difficulty in attracting, and the rising cost of, available staff. These cost pressures have been amplified with significant increases in energy costs. With lenders scrutinising profitability more than ever to ensure appropriate Interest Cover Ratio's (ICR's) in the face of rising debt costs, protecting and even driving margins has become the focus. Where they can, **operators have mitigated the impact of rising costs by delivering efficiencies**, whether this be through improved operation or offering reduced service. Investment in enhanced sustainability standards is an option many are exploring which can deliver long term savings.

Notwithstanding differences between operators, there are some segments that are fundamentally more resilient to cost pressures. Economy hotels, serviced apartments and hostels are all segments where the limited service offering has insulated them (to some extent) from the recent upward pressures on costs.

Hotels have not been immune to the headwinds facing the wider real estate investment market. The rising cost of borrowing to finance acquisition has resulted in a mismatch between seller and buyer expectations which has significantly reduced deal activity year to date, with estimated volumes for H1 2023 totalling £825 million, some 66% below the 10 year H1 average.

As we saw over H2 2023, activity continues to be dominated by private investors, who are taking advantage of reduced buyer competition. As a group, their decisions are less debt driven, with wealth preservation and the inflation hedge offered by Hotels being key drivers. The active buyer pool beyond these private investors is thin, but there is a willingness to do deals where the specifics stack up, as demonstrated by Dalata's recent acquisition of the Apex London Wall Hotel, which they have subsequently rebranded as Clayton Hotel London Wall.

Ultimately, the fundamental drivers of demand for UK hotels remain unchanged, and many of them have even accelerated post-pandemic. Hotels have one of the **best growth stories** across the real estate spectrum, offering the flexibility to drive income and profit, whether through changing manager, brand or operational structure. This flexibility, alongside its credentials as an inflation hedge, **are moving the Hotels sector up the target list for a wide variety of global investors.**



New fire safety regulations for English holiday lets

New fire safety regulations for holiday lets in England came into effect on 1 October 2023. The regulations apply to any holiday lets with capacity for 10 or more overnight guests.

The regulations for new fire safety legal provisions are contained within section 156 of the Building Safety Act 2022. Full, written assessments of fire risk will become a legal requirement for holiday let properties from October.

The preventive and protective measures include:

- Making guests aware of the fire risk assessment.
- Regularly reviewing the fire risk assessment.
- Providing emergency escape lights in bedrooms and along escape routes.
- Installing doors with a 30 minute fire protection capacity on protected escape routes.
- Installing linked hard-wired smoke detectors in all bedrooms, living spaces and protected escape routes.
- Undertaking annual inspections of all hot water and heating systems, including renewable energy sources.
- Installing fire escape signage.
- Ensuring that thumb turn locks are fitted on all exit doors.
- Commissioning an Electrical Installation Condition Report (EICR)/ fixed wire test every 5 years.

Not only does this have financial implications, it is likely to have some impact on the appearance of holiday lets.

In addition the government has published new guidance for 'small paying guest accommodation' i.e. those with capacity for up to 10 guests.

Under the new regulations holiday let owners will be required to have a fire risk assessment completed by a professional and seek advice from a professional on preventive and protective measures required by the Regulatory Reform (Fire Safety) Order 2005 (the Order).



New licencing requirement for short term lets

In January 2022 the Scottish Parliament approved new legislation to introduce a licensing scheme for short term let properties. The new powers are managed at local authority level and came into force on the 1st of March 2022. Hosts operating prior to the 1st of October 2022 were required to apply for a licence before the 1st October 2023; new hosts operating after the 1st of October 2022 are required to both apply for and receive the licence prior to accepting guests.

The licensing scheme covers a wide range of accommodation, including but not limited to, self-catering properties, B&Bs, guest houses, glamping structures and tents, caravans and lodges (where there is no caravan site licence). There are certain exemptions such as hotels, hostels and off-grid bothies that are at least 100m from the nearest public road and habitable building.

The licensing scheme includes new mandatory safety requirements that will cover every type of short-term let. In addition, local authorities can also opt to apply additional requirements for their region. Applications require to be accompanied by a range of safety certificates, floor plans and Energy Performance Certificates.

Licences will generally last for three years and are personal to the owner/operator named on the licence, not the property. New purchasers will therefore require to apply for and receive their own licence prior to trading. The legislation provides that local authorities can grant temporary licences in these instances whilst a full licence is applied for, however this is at the discretion of each local authority.

Operating without a licence will be a criminal offence, with a fine of up to £2,500. Critically, insurance policies will likely be invalidated should a licence not be in place.

Whilst the new licensing currently only applies to Scotland, both the English and Welsh Governments are considering introducing a scheme and have recently undertaken public consultations.

ASPECTS OF LEISURE

Sectors

GOLF	VISITOR ATTRACTIONS	LICENSED PREMISES	TRADE-RELATED PROPERTY
Courses	Theme parks	Public houses	Airports & Airfields
Driving ranges	Museums and heritage centres	Restaurants	Waste transfer and recycling centres
Golf developments	Children's activity centres	Bars	Abattoirs and food processing
Golf and country clubs	Wildlife parks		Crematoria, graveyards and woodland burial sites
.....		HOTELS	Religious facilities
HOLIDAY PROPERTIES	WATER-BASED LEISURE	City centre	Nurseries and garden centres
Static & touring caravan parks	Marinas and moorings	Country house	Schools, colleges & children's day nurseries
Holiday resorts and villages	Piers	Resort	Mineral extraction sites
Holiday cottage complexes	Sports and activity lakes	Business	
Lodge and chalet parks	Fishing complexes	Budget	ENERGY
Timeshare resorts and complexes		Sites and schemes	Photovoltaic
.....	EQUESTRIAN		Wind turbines
MOBILE HOME PARKS	Racecourses	URBAN LEISURE	Anaerobic digesters
.....	Studs and training establishments	Bowling centres	Waste to energy
SPORTS VENUES	Polo facilities	Cinemas	Traditional generation
Health and fitness clubs	Riding schools	Theatres	
Sports grounds	Livery yards	Snooker clubs	
Motor sports venues	Equine health centres	Night clubs	
Shooting schools		Casinos	
Ski centres and resorts		Bingo clubs	
Leisure centres			

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