

Eastleigh Court and the Former Eastleigh Court Stables

Socio-economic assessment

February 2026

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1. Executive summary

The Proposed Development

- 1.1 The Site comprises Eastleigh Court (a Grade II listed house) and the Former Eastleigh Court Stables (the 'former Eastleigh Stables') [together 'the Estate' or 'the Site']. The current use at Eastleigh Court is Class E (Commercial, Business and Service) albeit the building has been vacant for some time, and the lawful use of the former Eastleigh Stables is as Class C3 (Dwelling Houses) with an ancillary element of short stay rental. Planning permission has recently been granted at Eastleigh Court for a change of use from commercial to residential but this has not been implemented.
- 1.2 The **proposed application is for a change in the use of both Eastleigh Court and the former Eastleigh Stables to sui generis short stay accommodation**. The core offer would be luxury, bookable stays, with guests having exclusive use of each property either for quiet breaks or for special event gatherings, providing an upmarket short stay experience. To accommodate gatherings of up to a maximum of 120 people, a purpose-built, acoustically-insulated Pavilion is also proposed, alongside ancillary facilities, including a new swimming pool. The overall aim is to deliver a viable proposal that respects the historic character of the estate, its rural setting, and the local community.
- 1.3 The **target is to achieve an annual short stay occupancy of around 50% and host up to 52 special event gatherings each year (of which no more than 20 would involve between 61 and 120 guests, with the remaining events limited to a maximum of 60 attendees)**. All such special events are expected to generate demand for overnight accommodation within the wider area.

Why here?

- 1.4 The Site is located near to the civil parish of Bishopstrow, near the town of Warminster, in the local authority area of Wiltshire, in the South West region. Wiltshire is known for its rural beauty and heritage assets. **The area has significant historical and cultural relevance** and the Site is **close to significant landmarks** like Longleat, and the Cranborne Chase National Landscape. The accommodation and food services broad industrial group is a significant element of the local economy, reflecting its notable contribution to overall employment in the local area. Demand for high-quality accommodation in Wiltshire has recovered since the coronavirus pandemic, and to capture the enduring popularity/demand for short stays in this location, additional supply of (high quality) accommodation is required. This is particularly important in the context of creating conditions, including in rural areas like this location, in which businesses can adapt, expand and diversify. The provision of additional accommodation, with a diversified offer of being able to host special events, has the potential to drive economic impacts for the local and sub-regional economy.

This assessment

- 1.5 This report **provides an objective and transparent assessment** of the likely economic and social impacts of the Proposed Development to inform decision-making about the relative benefits of the proposals. It demonstrates that the Proposed Development would:
- Support local economic activity through **construction expenditure, ongoing employment, and supply chain opportunities**;
 - Contribute to the **visitor economy through guest expenditure and increased local spending**; and
 - Enable **significant investment in the repair and restoration of a heritage asset**.

- 1.6 Volterra has had access to information provided by the Applicant which has enabled us to test the market assumptions made and ensure that our estimates of economic impacts align with the proposed mix of uses.

Travel and tourism have a high economic impact

- 1.7 **Travel and tourism** are major pillars of the national economy, contributing £147bn in GDP, **equivalent to around 5% of the national economy**. The sector accounts for 1 in every 15 jobs nationally, highlighting tourism's importance not only as a driver of economic output, but also as a key source of employment and income.
- 1.8 The South West is one of the UK's leading tourism regions, capturing a particularly large share of domestic overnight tourism and associated spend. VisitBritain found that the **South West accounted for 17% of overnight trips in England** and that the region was the **destination for one in four holiday trips** in England for 2024. This places the region alongside London as one of the most popular destinations for domestic overnight travel.

The South West has a wide range of attractions and some of the top visited are in Wiltshire

- 1.9 The VisitEngland destination overview of the South West highlights the region's attractions, ranging from seaside locations and 'fairytale' gardens to cultural city heritage and museums. This offer directly aligns with the shift towards an experience-led economy in which consumers are increasingly prioritising experiences over material possessions.
- 1.10 **Three of the top ten visitor attractions in the South West by visitor numbers are in Wiltshire** – Stonehenge (#1), Longleat (#3) and Stourhead House and Garden (#10) **which together attracted over 2.5 million visitors in 2024**.

Wiltshire's tourism economy could attract more overnight stays

- 1.11 Domestic overnight visitors make up a smaller proportion of visits than day trips but are economically more valuable, with spend per trip around 6 times higher for an overnight trip. However, despite its rich landscape, leisure and cultural offer, **Wiltshire has one of the highest ratios of day visits to overnight visits**. At around ten to one it is considerably higher than the South West average of six to one. This suggests there is an opportunity to capitalise on the area's strengths and attract more overnight visitors, and their associated expenditure.

Preferences are shifting towards higher quality

- 1.12 **Visitor preferences are increasingly shifting towards higher quality, experience-led accommodation**. Experiences are now the key driver of the destination choice of luxury travellers. Evidence suggests that 75% of luxury travellers prioritise historic and cultural experiences, followed by food (66%), wellness (56%) and nature-based experiences (56%). These preferences reinforce the importance of accommodation that can offer a distinctive setting and provide access to a broader visitor experience beyond the physical accommodation. Luxury is often characterised less by scale and more by privacy, character, service, and setting.
- 1.13 This shift in visitor preferences is reflected in recent occupancy trends for higher quality hotels. **Occupancy rates for higher end accommodation have increased steadily since 2022**, reflecting respective post-coronavirus pandemic recovery trends. This upward trajectory suggests that demand for higher quality

accommodation is growing rather than static, including in locations that have traditionally supported lower levels of overnight stays.

Visitors to luxury accommodation spend more in the local economy

- 1.14 A defining feature of visitors that use luxury accommodation is their higher level of visitor spend, a significant proportion of which typically occurs within the local economy. **High spending tourists typically spend 14 times more than average visitors.** In rural and semi-rural locations, much of this spend is likely to be retained locally as visitors support independent local businesses such as pubs, restaurants, farm shops, local producers and specialist service providers. Higher levels of visitor spend translate directly into greater economic output and employment supported per stay.
- 1.15 Luxury short stay accommodation therefore provides a mechanism for supporting local jobs and businesses, especially where visitor spend extends beyond the accommodation itself into the surrounding area. **There are over 120 premises that accommodate uses that relate to the visitor economy (retail, hospitality and leisure) within a 15-minute drive of the Proposed Development.** Within a 30-minute drive, there are 560 applicable premises, suggesting considerable opportunity for local businesses to benefit from the visitors that the Proposed Development would attract.

Wiltshire's luxury accommodation offer remains limited

- 1.16 Despite these trends, the current supply of luxury accommodation in Wiltshire remains limited. **Of the approximately 5,800 rooms in Wiltshire, only around 2% fall within the luxury category (compared to 4% regionally and 6% nationally).**
- 1.17 While Wiltshire supports a substantial volume of visitor activity, it is potentially constrained in its ability to cater for higher value demand that prioritise quality, setting and distinctive experiences. In the absence of a sufficient range of types of accommodation, there is a risk that this demand will either be displaced to other locations or absorbed by accommodation that does not fully align with visitor expectations, limiting the economic value captured locally. **To translate growing demand into economic benefit, including higher visitor spend, longer stays and stronger links with local supply chains, additional accommodation capacity that improves the quality of the offer is required.**

Events are a significant driver of alternative incomes

- 1.18 Heritage buildings and the rural economy both seek diversified revenue sources through hosting events. Events and private celebrations represent a significant and resilient source of economic activity, with the UK's event industry having an estimated annual value of over £61bn in 2024.
- 1.19 **Weddings are one of the largest single components of the events market**, with total annual expenditure across the UK in 2018 estimated to exceed £10 billion. Average guest numbers to weddings are around 80-100 attendees, meaning each event brings temporary guests to the host location, many of which will spend in the local area. **Guests spend on average £692 per wedding attended**, resulting in substantial spending in nearby hotels, transport services, and retail and hospitality businesses. This is particularly relevant where not all guests can be accommodated or catered for on site, as would be the case for the proposals at Eastleigh Court.
- 1.20 Couples show a strong preference for distinctive settings which offer a unique experience. Rural and destination-style venues offer privacy, exclusivity, and high-quality experiences and are therefore able to capture the current demand for such event spaces. **Barns and country houses are now among the most**

popular wedding venue types, with 21% and 15% of weddings taking place in these venues respectively.

- 1.21 A similar dynamic is evident in corporate and business events, where organisers are increasingly looking beyond standard hotel conference rooms and city centre space. Unusual / multi-purpose venues (a broad category that includes visitor attractions, historic buildings, and other non-standard business venues) accounted for 29% of events in 2024 aligning with demand for more characterful settings.

In contrast there has been a structural shift in office demand and occupier requirements

- 1.22 In Wiltshire, office vacancy rates have risen from a low 3.1% in 2019 to a high of 9.8% in 2024. This represents a sustained increase rather than a short-term fluctuation. A similar pattern is evident across the South West and England as a whole, although Wiltshire has consistently recorded higher vacancy rates than the regional and national averages over recent years. The scale and persistence of these vacancies indicate a structural weakening in demand for office space.
- 1.23 There has also been a shift in occupier requirements towards high-performing, sustainable buildings. Buildings with strong environmental credentials attract higher levels of occupier demand and achieve stronger rental performance. Older and listed buildings can face inherent challenges in meeting these expectations. As a result, buildings of this nature are at risk of functional and economic obsolescence when retained as office use.

Economic impacts

- 1.24 For completeness, this assessment compares the economic impact of the Proposed Development against two alternatives: counterfactual 1 where the extant permission is implemented and residential use is reinstated and counterfactual 2 where Eastleigh Court remains in use as offices. In both of those cases the former Eastleigh Stables continues to operate as short-stay accommodation.

Construction workers

- 1.25 Construction of the Proposed Development would support an estimated 120 construction job years, equivalent to 70 construction jobs over the 20-month construction period. These construction workers would spend an estimated £272,000 in the local area.

Operational workers – direct

- 1.26 The Proposed Development would support an estimated 21 FTEs or 32 jobs, of which half are associated with servicing the short stay accommodation and half with the events.
- 1.27 If residential use were reinstated, the ongoing short stay letting at the former Eastleigh Stables would support an estimated 2 FTEs or 6 jobs. This would be the same if the current office stock declines into obsolescence.
- 1.28 Potential for office use is unlikely. On 3rd June 2025, a reputable national agent wrote to the Applicant explaining that in September 2023 the previous owners had appointed them to market Eastleigh Court but without success over a period of 10 months. The agent advised that *'the challenge with this property is that, given the Court's listed status and its geographical location, it is not really an attractive or suitable location for commercial uses. Eastleigh Court was in use as offices by the previous owner for a period of time, however owing to the poor quality of the office accommodation and the size restrictions on the floorplates,*

there was no interest coming forward during this marketing period. Nonetheless, for this study, we have hypothetically assessed that the office space could support 25 FTEs or 39 jobs at modest occupancy levels.

Visitor expenditure

- 1.29 The guests to the events would spend money off site. For the smaller events this would be more modest associated with day trips, activities and restaurants. For the larger events, as well as this expenditure, some guests would stay in accommodation off site. Combining this results in **an estimated £980,000 – £1.3 million per annum that would be spent off site in the local area**. This would support additional jobs in the local area.

Net additional employment

- 1.30 The definition of 'net additional employment' includes not only jobs generated by the development but also other induced employment e.g. allowing for jobs created in the wider economy from spending of guests and staff in the local area. Allowing for some displacement and leakage of activity, as well as the additional supply chain, worker and visitor expenditure, allows us to estimate the net additional employment supported.
- 1.31 The Proposed Development would support more net additional economic activity than any of the counterfactuals, including the hypothetical scenario of modest office occupancy as above.
- 1.32 The **Proposed Development generates between 46 – 65 net additional FTEs or 56 – 79 net additional jobs**. This compares to just 2 FTEs or 6 jobs if residential use were reinstated, and 25 FTEs or 39 jobs under the hypothetical office occupancy assumptions.
- 1.33 The **Proposed Development would therefore support over twenty times the economic activity of the alternative of reverting to residential use and double the realistic office alternative**.
- 1.34 Total employment directly supported by the operation of the site is expected to **directly generate GVA of approximately £810,000 per annum**, representing **an uplift of £620,000** compared to how it currently operates.
- 1.35 It is estimated that the Proposed Development would result in **tax revenues of between £245,000 and £325,000 per annum**.

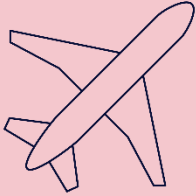
Social impact

- 1.36 The Proposed Development has the potential to generate a range of social benefits alongside its economic effects, through **job creation, supply chain opportunities, visitor spend and targeted social value initiatives**. The socio-economic evidence indicates a relatively tight local labour market (very low unemployment) alongside a more constrained working age population and a weaker qualifications profile than the South West average, highlighting the **importance of delivering a mix of accessible roles with clear progression routes (including training, apprenticeships and local recruitment pathways)**.
- 1.37 Bishopstrow stands out as having the highest levels of income deprivation in the local study area, including pockets among the most deprived nationally, and also contains small areas of relatively higher employment deprivation.
- 1.38 The **Applicant has already demonstrated a commitment to local spending** particularly in Warminster, Salisbury and Frome across grounds maintenance, specialist contractors and everyday services. Building on this strong track record, as part of the operation of the Proposed Development, the Applicant is proposing to commit to the following measures:

- Supporting nearby schools with educational visits exploring biodiversity, sustainable energy, and heritage;
- Collaboration with local heritage, biodiversity, and sustainability groups, with opportunities for collaborative visits and activities;
- At least five Wiltshire-based contractors or specialist trades invited to tender during construction and refurbishment;
- Two free community focused day events and three free-access public open days per year, allowing access to the grounds and Eastleigh Court;
- A minimum of 10 Wiltshire based businesses promoted to maximise local supply chain spending; and
- A local first operating approach that seeks to ensure at least five local service providers are engaged on an ongoing basis to support estate operations.

The need for the Proposed Development

Tourism and travel



Contributes **£147bn** in **GDP** for the national economy

Accounts for **1 in every 15** jobs in the UK

Events sector

Estimated to be worth **over £61bn** in 2024



Weddings contributed over **£10bn** to the UK in 2018 and generate an average **guest spend of £692** per wedding

Wiltshire

Of the 5,800 rooms in Wiltshire, **only 2% fall within the luxury category**, compared to the 4% regionally and 6% nationally

Wiltshire has three out of the top 10 visitor attractions in the South West which attracted **2.5 million visitors** in 2024

Contribution of the Proposed Development

Increases the supply of accommodation that **encourages visitors to choose Wiltshire as an overnight destination** to builds on the popularity of day trips

Supports the (diversification of) rural economy through **local employment, procurement, and visitor spending**

Maximises local economic spillover while remaining sensitive to the remote setting

Invests into the **restoration** of a heritage asset and ensures that **conservation** of a historic building is funded in perpetuity

Directly addresses Wiltshire's lack of luxury accommodation stock by **providing distinctive short stay accommodation** that enables **high spending** visitors to spend in **local businesses** such as pubs, restaurants, shops, and services

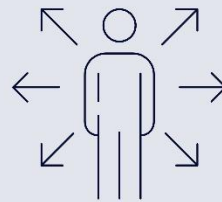
Economic impacts

Construction impacts



70

direct jobs supported on average over the 20-month construction period (equivalent to 120 total job years)



£272,000

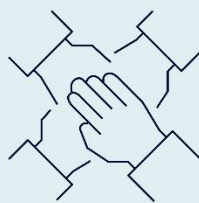
total construction worker expenditure in the local area

Operation impacts



32

estimated gross direct jobs (or 21 FTEs) on-/off-site



56 – 79

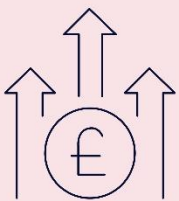
net additional jobs (46 – 65 FTEs) to the local and wider economy



20x

the number of FTEs compared to reverting to residential use

GVA and tax revenues



£810,000

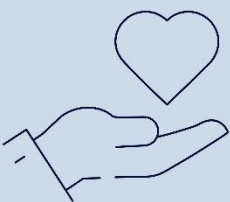
in economic output (GVA) generated by on site employment per annum



**£245,000 –
£325,000**

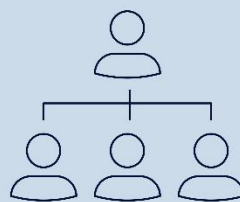
in tax revenues generated by the Proposed Development per annum

Local spending



**£980,000 –
£1.3m**

off site visitor spend in the local area per annum



Already spent around

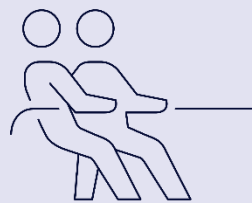
£396,000 across

Warminster, Salisbury, and Frome

Social impacts

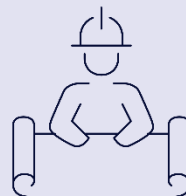
Community benefits

Supporting nearby **schools** with educational visits exploring **biodiversity, sustainable energy, and heritage**



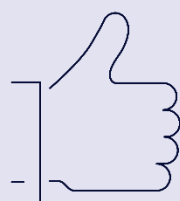
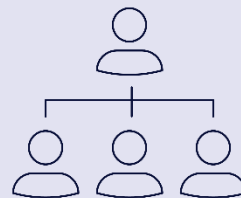
Collaboration with local heritage, biodiversity, and sustainability groups, with opportunities for **collaborative visits and activities**

At least five Wiltshire-based contractors or specialist trades invited to tender during construction and refurbishment



Two free community focused day events and **three free-access public open days** per year, allowing access to the grounds and Eastleigh Court

A minimum of **10 Wiltshire based businesses** promoted to **maximise local supply chain spending**



A local first operating approach that seeks to ensure **at least five local service providers** are engaged on an ongoing basis to support estate operations

2. Introduction

- 2.1 Volterra Partners LLP ('Volterra') has been appointed by Kindred Living Project ('the Applicant') to provide a socio-economic assessment in support of the planning application for a short stay visitor accommodation and special events (e.g. weddings and civil partnership ceremonies) destination at Eastleigh Court and the Former Eastleigh Court Stables (the 'former Eastleigh Stables') [together 'the Estate' or 'the Site'].
- 2.2 The Site comprises Eastleigh Court (a Grade II listed house) and the former Eastleigh Stables. The current approved use at Eastleigh Court is Class E (Commercial, Business and Service) albeit the building is currently has been vacant for some time, and the lawful use of the former Eastleigh Stables is as Class C3 (Dwelling House) with an ancillary element of short stay rental. The former Eastleigh Stables is currently achieving around 24% occupancy. Planning permission has recently been granted (but not implemented) for Eastleigh Court for a change of use from commercial to residential.
- 2.3 The proposed application is for a change in the use of both Eastleigh Court and the former Eastleigh Stables to sui generis short stay accommodation. The core offer would be luxury, bookable short stays, with guests able to use the properties either for quiet breaks or for special event gatherings, providing an upmarket short stay experience.
- 2.4 To accommodate special event gatherings of up to a maximum of 120 people, a purpose-built, acoustically-insulated Pavilion is also proposed, alongside ancillary facilities, including a new swimming pool. The overall aim is to deliver a viable proposal that respects the historic character of the estate, its rural setting, and the local community.

Purpose of this assessment

- 2.5 The purpose of this assessment is to provide an objective and transparent assessment of the likely economic and social impacts of the Proposed Development to inform decision-making about the relative benefits of the proposals. Specifically, the assessment demonstrates that the Proposed Development would:
- Support local economic activity through construction expenditure, ongoing employment, and supply chain opportunities;
 - Contribute to the visitor economy through guest expenditure and increased local spending; and
 - Enable significant investment in the repair and restoration of a heritage asset.
- 2.6 This report builds on the information provided in other planning documentation, namely the **Design and Access Statement**, **Planning Statement**, and **Heritage Impact Assessment**. Volterra has also had access to various other information provided by the Applicant which has enabled us to test the market assumptions made and ensure that our estimates of economic impacts align with the proposed mix of uses.

Structure of the report

- 2.7 The report presents the findings of an assessment of the socio-economic impacts of the Proposed Development and is structured around the following sections:
- **The Proposed Development:** This section describes the site and the Proposed Development in detail. It includes the key components of the scheme, how it would operate, and the relevant planning and heritage context. A summary of the design principles and embedded mitigation measures that will help ensure the proposals are appropriate for the site and its rural setting is also presented.
 - **Policy and strategy context:** This section summarises the relevant national and local planning policy and applicable economic strategies to the nature of the proposals. It focuses on the priorities most

relevant to the Proposed Development including sustainable tourism, how development can contribute to supporting the visitor economy and the role of heritage-led regeneration. It also considers how the Proposed Development aligns with these objectives and the extent to which it would help deliver them.

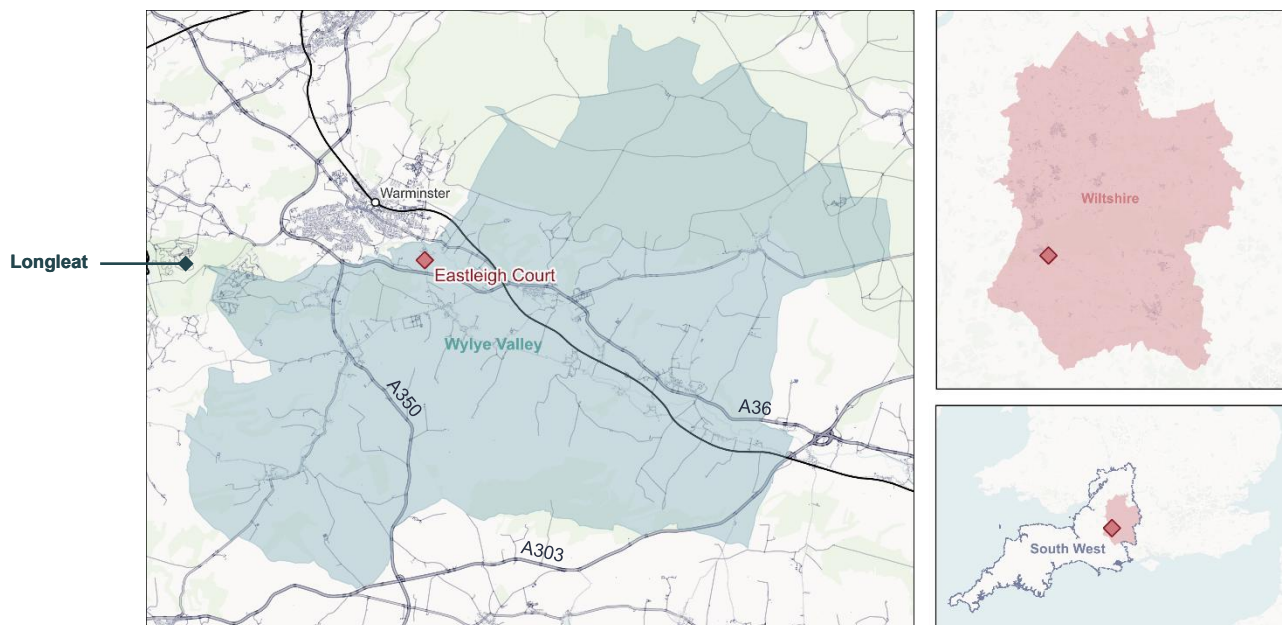
- **The need for luxury short stay accommodation and event space:** This section demonstrates the need for additional unique, luxury accommodation and event space in Wiltshire, focusing on the current offering, expected demand and the market context in which the luxury offer is proposed. It also covers the demand for the specific type of events offer proposed and demonstrates how the scheme would contribute towards meeting this need.
- **Economic impacts:** This section estimates the economic impacts of the Proposed Development, estimating the number of jobs supported by the development in the construction and operational phases, the worker expenditure associated with these jobs, and the GVA and taxation revenues they support. Estimates are also provided which quantify the amount of guest expenditure expected to be generated by the accommodation component of the Proposed Development.
- **Social impacts:** This section describes the wider social benefits anticipated as a result of the Proposed Development, with a particular focus on the community benefits and the potential social value through the Applicant's committed measures to maximise these.

3. The Proposed Development

- 3.1 This section outlines the key components of the Proposed Development at the Site, including an overview of the location, planning history, and details of the proposed scheme. The development seeks to sensitively transform Eastleigh Court and the former Eastleigh Stables into a luxury short stay accommodation offer with improved events capability, that both restores heritage assets and provides modern, high-quality hospitality facilities. The section also outlines the proposed events operations, which will be carefully managed to balance the needs of a successful and viable business with those of the local community.

Location of the Proposed Development

- 3.2 Eastleigh Court ('the Site') is located near to the civil parish of Bishopstrow, near the town of Warminster, in the local authority area of Wiltshire, itself in the South West region (as shown in **Figure 3.1**). The Site is located in the Wylde Valley ward. Wiltshire Council is the local planning authority. Bishopstrow is a small, picturesque village situated 1.5 miles south-east of Warminster, a town with significant historical and cultural relevance. Warminster is a market town with roots to the Saxon era, known for its Georgian architecture and proximity to significant landmarks like Longleat House and Safari Park, and the Cranborne Chase National Landscape. Wiltshire is known for its rural beauty and heritage assets. The wider area has a rural countryside character and includes major national visitor attractions such as Stonehenge, meaning it accommodates tourism and leisure activities.
- 3.3 The location is well connected by road and rail infrastructure. The nearest railway station, Warminster, is approximately 1.5 miles (by road) from the Site, and offers regular services to larger urban centres including Bristol, Cardiff, Southampton, Portsmouth, and London, with direct connections to major stations like Paddington. Warminster railway station is accessible by a 33-minute walk or 8-minute car journey from the Site, making it highly accessible for guests and staff. Road access to the Site is provided by the A36, which passes near to the Site and provides connectivity to Salisbury and Bath, as well as the A350 nearby which allows for connectivity with the M4 corridor that facilitates travel to London and other regional hubs.

Figure 3.1 Location of the Proposed Development

Source: OS data © Crown copyright and database right 2025.

Planning history

- 3.4 Planning history has consistently demonstrated broad support for reinstatement of domestic use. Eastleigh Court has been utilised as a commercial office space for many years however numerous planning applications have sought change of use from commercial to domestic dwelling, with applications in the years 2012 (W/12/00724/FUL), 2015 (15/05736/FUL) and 2018 (18/06999/FUL) all granted permission. Residential permissions were not implemented because the previous owners were unable to find a buyer. Similarly the office space was unable to be let due to lack of demand.
- 3.5 The Site has also been subject to a number of approved demolition and construction works to extend or adapt the buildings, external areas and associated works including the driveways, most recently in 2017 (17/04066/FUL), 2020 (20/06499/FUL), and 2023 (2023/08405).

Extant permission

- 3.6 The extant permission at Eastleigh Court comprises listed building consent (2023/08631) and full planning permission (2023/08405) following granting of applications made in October 2023 for change of use from commercial office to a dwelling, reinstatement of the west wing, replacement of the modern single-storey extension, internal alterations, and the addition of a tennis court, swimming pool pavilion, new garages, and external works. These were approved in January 2025, with the case officer citing that the principle of development was wholly acceptable given the continued support through the Site's recent planning history.

The series of granted application shows continued Council support for reinstating residential use which would restore the Court to being more closely in line with its historical use.¹

The Proposed Development

Evolution of the Proposed Development

- 3.7 This economic assessment is provided in support of the present Proposed Development, the plans for which have evolved to take into account community views, as set out in the **Design and Access Statement** and **Statement of Community Involvement** submitted as part of the application:

Features of the Proposed Development that could lead to economic and social benefits

- 3.8 The Proposed Development at the Site incorporates a range of features that will enhance the Site's function and its integration with the local community and economy. The vision for the Proposed Development is set out within the **Design and Access Statement**. In summary, the key features that could lead to economic and social benefits include:
- Restoration and sustainable reuse of the Grade II listed Eastleigh Court: which will ensure the building's preservation while adapting it for contemporary use that contributes to the modern (rural) economy.
 - Luxury short stay accommodation: providing exemplary high-end holiday rental for family gatherings, corporate retreats and private events.
 - New acoustically-treated Pavilion building for events: a purpose-built space designed for smaller scale gatherings with capacity for up to 120 guests, complemented by new pool facilities.
 - Carefully managed event operations: limiting the number and scale of events to ensure alignment with local community expectations.
 - Job creation and local employment: the creation of full time and seasonal roles within hospitality, events, and property management.
 - Support for local businesses and suppliers; the use of local service providers for hospitality, catering and event needs.
 - Biodiversity improvements and landscape restoration: ecological enhancements and the planting of native trees and wildflowers to support local biodiversity.
 - Local education and interest group engagement: opportunities for local interest groups and educational visits to access the estate on agreed occasions, thus benefiting from the restored and improved landscape.
 - Community access and use: the provision of facilities for community-focused day events and public open days for a minimum number of days a year.

Operational details of the visitor accommodation and events offer

- 3.9 The operational model for the Estate is designed, and has evolved, to ensure a balance between offering highest quality hospitality and respecting the needs and concerns of the local community. The intended operation of the Proposed Development centres around luxury short stay accommodation with special

¹ studioshaw, 2025. Eastleigh Court Design and Access Statement (page 24)

events gatherings that vary by size and type being limited in terms of frequency, maximum number of guests and maximum number of day guests, as summarised in **Table 3.1**.

Table 3.1 – The operational model of the Proposed Development has been designed to balance the frequency, total number of guests and number of day guests not sleeping on site

Summary of operations

Stay type	Frequency per annum	Maximum number of guests	Day guests not sleeping on site
A: small scale rental including gatherings, holidays, celebrations, micro weddings	Up to 32	Up to 60	4 to 18
B: small to medium rental weddings, celebrations, gatherings	Up to 8	61-90	34 to 48
C: maximum rental weddings, celebrations, gatherings	Up to 12	91-120	64 to 78

Source: Information provided by the Applicant.

4. Policy and strategy context for the Proposed Development

- 4.1 Consideration of the economic and social benefits of the Proposed Development is subject to a range of applicable national and local statutory policies and guidance. The policy context sets out broad support for development which strengthens the rural economy and supports sustainable tourism and leisure while remaining sensitive to the character of environmental and heritage assets.

National

The National Planning Policy Framework (NPPF) (2025)

- 4.2 The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England and how these should be applied.² It provides a framework for decision-making in relation to development. Policies within the NPPF promote sustainable growth and economic development in rural areas. The current framework places particular focus on building competitive economic growth balanced with supporting healthy communities and protecting the natural environment, all of which are couched in encouraging investment in the UK economy.
- 4.3 Specifically, the (draft) policies which are relevant to the Proposed Development are:
- Achieving sustainable development: this policy states an economic objective to create a robust, adaptable, and competitive economy by ensuring there is adequate appropriate land available to support growth, innovation, and enhanced productivity.
 - Building a strong, competitive economy: this policy states that decisions should encourage conditions in which businesses can invest, expand and adapt.
 - Supporting a prosperous rural economy: this policy states that planning decisions should enable sustainable growth and expansion of all types of businesses in rural areas. It further mentions that sites which meet local business and community needs in rural areas may have to be found adjacent to or beyond existing settlements.
 - **S5: Principle of development outside settlements** – Certain forms of development, including rural tourism businesses and services, should be approved unless adverse effects substantially outweigh benefits.
 - **E1: Providing the conditions for long term economic growth** – Development plans should outline a clear vision for sustainable growth, address investment barriers, and support the modern economy, including sectors like leisure and tourism;
 - **E2: Meeting the need for business land and premises** – Commercial developments should be assessed based on their economic benefits, alignment with the area's economic vision, and their ability to meet unmet land and premises needs; and
 - **E4: Rural business development** – Development should rural business growth through building conversions, well-designed structures, and facilities for leisure and tourism. Development outside

² MHCLG, 2025. National Planning Policy Framework. Note: The most recent adopted NPPF was last updated on 7 February 2025. References in this report relate to the draft NPPF published for consultation in December 2025, with consultation underway at the time of preparation of this document. The two documents are broadly aligned, although the draft text moves policy forward.

settlements should prioritise previously developed land, be well-related to existing development, and respect local character.

Local

Wiltshire Local Development Scheme (2025)

- 4.4 The Wiltshire Local Development Scheme (2025) sets out the programme and timetable for the preparation of planning policy documents in Wiltshire.³ It confirms that the Wiltshire Core Strategy and made Neighbourhood Plans, including the Warminster Neighbourhood Plan, currently form the statutory development plan for decision-making, and that a review of the Wiltshire Local Plan is underway but not yet adopted.

The Wiltshire Core Strategy (2015)

- 4.5 The Wiltshire Core Strategy (2015) is a planning framework that sets out the strategic vision, policies and objectives for the development of Wiltshire up to 2026.⁴ It provides a development plan that hopes to balance the need to protect the environment with the need for jobs and homes in the Wiltshire area.
- 4.6 Overall, the Wiltshire Core Strategy direction of policy aligns with the Proposed Development in principle by promoting tourism-led economic growth, encouraging appropriately scaled visitor accommodation, and supporting development that contributes to vitality of rural communities. Specifically, policies of relevance are:
- **Core Policy 34 Additional Employment Land:** this policy states there is a need to increase the land available for employment with developments that are considered essential to the wider strategic interest of the economic development of Wiltshire to be supported.
 - **Core Policy 39 Tourist Development:** this policy states that within principal settlements and market towns, suitably scaled tourism development, including attractions and accommodation, will be supported subject to sequential assessment. It further states that outside the Principal Settlements and Market Towns, tourist and visitor facilities should be located in or close to Local Service Centres or Large and Small Villages, where practicable, be located in existing or replacement buildings.
 - **Core Policy 41 Sustainable Construction And Low-Carbon Energy:** this policy encourages sustainable building practices and the integration of low carbon energy solutions in new developments.
 - **Core Policy 48 Supporting Rural Life:** this policy focuses on supporting rural communities and maintaining rural services and facilities by encouraging proposals that convert and re-use buildings for employment, tourism, cultural and community uses, subject to the satisfying of given criteria.
 - **Core Policy 58 Ensuring The Conservation Of The Historic Environment:** this policy seeks to protect, conserve, and enhance heritage assets and their settings, where appropriate. It hopes to ensure that development proposals enhance heritage assets, sustaining their significance and securing their optimum viable use.

³ Wiltshire Council, 2025. Wiltshire Council Local Development Scheme

⁴ Wiltshire Council, 2015. Wiltshire Core Strategy

Wiltshire Local Plan Review (Pre-submission Draft) (2023)

- 4.7 The Wiltshire Local Plan Review (Pre-Submission Draft) (2023) sets out the emerging spatial strategy and place-shaping priorities for Wiltshire up to 2038.⁵ Once adopted, this document will replace the Wiltshire Core strategy and, in the interim, is a material consideration in planning decision-making.
- 4.8 Overall, the emerging Local Plan supports development that strengthens the visitor economy, promotes leisure and tourism related uses, and contributes to the vitality and regeneration of Market Towns. It also emphasises the importance of delivering development that is sensitive to heritage assets, landscape character and the role of surrounding rural areas. Specifically, of relevance is:
- **Policy 69: Tourism and related development** – Tourism and related development outside the Principal Settlements and Market Towns will be supported where it can be demonstrated that the proposal will result in economic, social and environmental benefits in the local area and should be located in, or close to Local Service Centres or Large and Small Villages and, where practicable, be located in existing or replacement buildings.

⁵ Wiltshire Council, 2023. The Wiltshire Local Plan Review (Pre-Submission Draft) (2020-2038)

5. The need for luxury short stay accommodation and event space

Role of the local short stay accommodation market and event destinations

The tourism and visitor economy is critical to the wider UK economy

5.1 Travel and tourism are major pillars of the national economy. VisitBritain reports that in 2024, the UK’s travel and tourism sector had a GDP impact totalling £147 billion (bn), equivalent to around 5% of the national economy.⁶ When the economic activity from local residents spending their wages earned from tourism jobs is taken into account, the total GDP contribution rises to £206bn, which represents approximately 7% of the UK economy.

Table 5.1 – In 2024 there were 1.2bn tourism trips in the UK, resulting in a spend of £126bn

Economic contribution of the travel and tourism sector (2024)

Activity	Number of visits in 2024	Total 2024 spend (£)	Average spend per visit (£)
Inbound trips	42,562,000	37,126,000,000	872
Domestic overnight stays	107,109,000	33,446,000,000	310
Domestic day trips	1,046,830,000	55,599,000,000	53
Total	1,197,299,000	126,172,000,000	139

Source: VisitBritain, 2026. Economic Value of Tourism

5.2 As illustrated in **Table 5.1**, tourism activity in the UK is underpinned by very high volumes of visits, with nearly 1.2bn trips taken across the country in 2024. These visits generated a total visitor expenditure of approximately £126bn, taking into account those travelling from abroad, domestic overnight stays and domestic day trips. The scale of this activity demonstrates that tourism is a fundamental component of the national economy that contributes to the UK’s GDP through its ecosystem of direct (employment), indirect (spending), and induced (supply chain) channels. These channels are namely jobs in tourism-facing businesses, the supply of goods and services those businesses purchase to operate, and the wider economic activity supported when workers across both tiers spend their wages.

5.3 The GDP contribution of the tourism industry to the UK economy is underpinned by the employment it supports. With over 2.4 million employed in tourism industries, the **sector accounts for 1 in every 15 jobs**

⁶ VisitBritain, 2026. Economic Value of Tourism

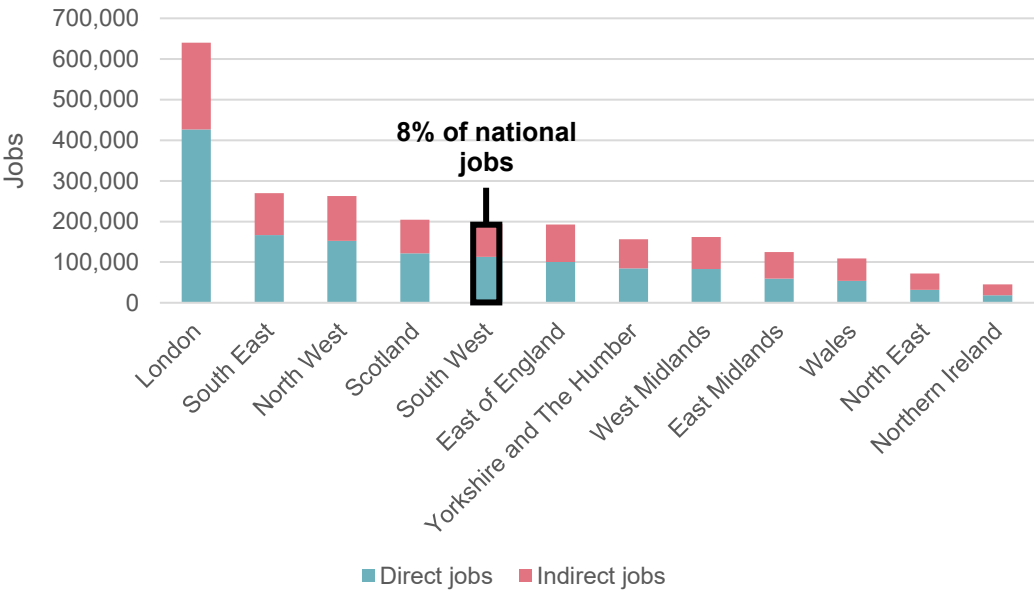
nationally.⁷ This highlights tourism’s importance not only as a driver of economic output, but also as a key source of employment and income across regions and communities, particularly in locations where tourism and hospitality play a central role in the local economy. Employment supported by the sector is expected to grow further, with forecasts indicating that the value of total tourism activity could reach £161 billion by 2030 (in real terms), representing a growth of approximately 9.3% from 2024 and supporting an additional 175,000 jobs nationwide.

The South West region captures a high proportion of this benefit and tourism is an important aspect of the economy in this region

5.4 **Figure 5.1** illustrates the distribution of tourism employment across the regions of the UK, demonstrating that tourism-related jobs are widely dispersed and not simply concentrated in a small number of locations. This shows that the South West region is important for supporting travel and tourism’s contribution to the UK economy. Of the total jobs supported by the travel and tourism sector nationally (both direct and indirect), the South West region is responsible for 8% (comprising nearly 113,000 direct jobs and 81,000 indirect jobs).⁸

Figure 5.1 – The South West contributes 8% of direct and indirect tourism jobs

Jobs supported by tourism, by region (no., 2025)



Source: VisitBritain, 2026. Economic Value of Tourism.

5.5 As shown, the South West is one of the UK’s leading tourism regions and accordingly captures a particularly large share of domestic overnight tourism and associated spend. VisitBritain’s research found that **the**

⁷ VisitBritain, 2026. Economic Value of Tourism

⁸ VisitBritain, 2026. Economic Value of Tourism.

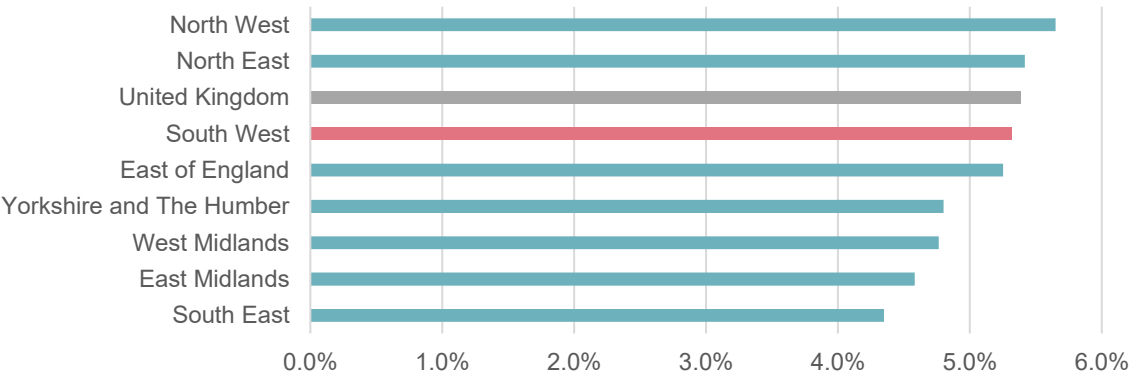
South West accounted for 17% of overnight trips in England and that the region was the destination for one in four holiday trips in England for 2024.⁹ This places the region alongside London as one of the most popular destinations for domestic overnight travel.

5.6 In addition to strong domestic demand, the South West also captures a meaningful share of inbound tourism which is valuable as international visitors typically stay for longer and spend more per trip, helping to diversify demand beyond the domestic market.¹⁰ In 2024, the South West accommodated approximately 2.4 million inbound visits, generating over £1.5 billion in visitor spending, accounting for over 13% of the region's total tourism revenue¹¹. These visits accounted for over 19 million visitor nights, reflecting the region's role as a destination for longer stay international tourism. The recovery of inbound tourism spend to pre-pandemic levels reinforces the South West's position as a high-value, internationally recognised visitor destination that complements its strong domestic tourism base.

5.7 As well as contributing to the success of the sector nationally, tourism is economically important for the South West region itself. The relative importance of tourism is illustrated in Figure 5.2 which shows the contribution of tourism to each region's GDP. In 2024, tourism accounted for 5.3% of GDP in the South West region.¹² This indicates a higher degree of dependence on the visitor economy than in most English regions as only the North East and North West exhibit a greater relative reliance on tourism by this measure.

Figure 5.2 – By proportion of GDP, the South West relies on tourism more than any other region in the south of England (with the exception of London)

Proportion of GDP contributed by tourism, by region (excluding London, %, 2025)



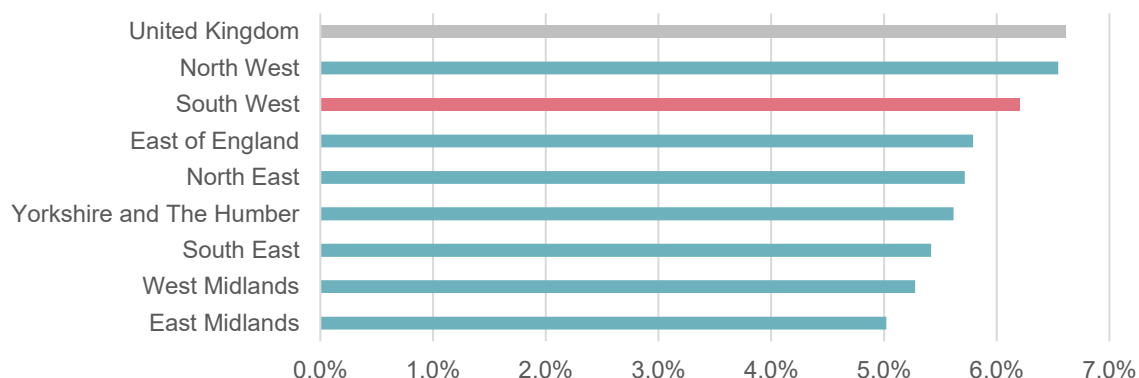
Source: VisitBritain, 2026. Economic Value Of Tourism Data

5.8 The tourism sector also plays an important role in supporting employment in the South West, reflecting around 6.2% of the region's total employment.¹³ Although behind the national average of 6.6% (which is skewed by the contribution of London), the proportional contribution of tourism to the South West region economy is the second highest of any region (excluding London).

⁹ VisitBritain, 2025. GB tourist annual report 2024, domestic overnight trips
¹⁰ VisitBritain, 2026. Economic Value Of Tourism Data
¹¹ VisitBritain, 2025. Inbound visits and spend: annual, regional
¹² VisitBritain, 2026. Economic Value Of Tourism Data
¹³ VisitBritain, 2026. Economic Value Of Tourism Data

Figure 5.3 – Tourism share of regional employment for 2024

Proportion of employment contributed by tourism, by region (excluding London, %, 2025)



Source: VisitBritain, 2026. Economic Value Of Tourism Data.

5.9 The region offers coastal destinations, countryside and historic towns, which align closely with the types of experiences that drive higher value leisure trips. The VisitEngland destination overview of the South West highlights the region's attractions, ranging from seaside locations and 'fairytale' gardens to cultural city heritage and museums.¹⁴ This offer directly aligns with the shift towards an experience-led economy in which consumers are increasingly prioritising experiences over material possessions.¹⁵ As part of this, visitors are seeking immersive and place-specific experiences, which in turn supports the demand for accommodation in high-quality destinations that are rich in heritage, beautiful landscapes and curated leisure experiences.

5.10 The South West's popularity as a visitor destination is therefore reinforced by the strength and variety of its attractions which include internationally recognised heritage and leisure destinations that draw high visitor numbers. For example, leading attractions in the South West include Stonehenge, the Roman Baths and Longleat. **Table 5.2** below summarises the region's top tourist attractions and highlights the visitor numbers from 2023 and 2024, which across all ten totalled nearly 7 million visitors.¹⁶ Together, these attractions demonstrate the depth of the region's experience offer and explain why the South West consistently captures a high share of domestic tourism and demand.

Table 5.2 – Three of the top ten visitor attractions in the South West in 2024 by visitor numbers are in Wiltshire

Most visited attractions in the South West by visitor numbers (2023 and 2024)

Attraction	County	Visitors in 2023	Visitors in 2024
Stonehenge	Wiltshire	1,327,423	1,363,252
Roman Baths	Somerset	991,437	1,011,511

¹⁴ VisitEngland, 2025. Places to visit, South West England¹⁵ Savills, 2026. Experience-led Economy: when experience becomes the currency¹⁶ VisitBritain, 2025. Annual attractions full admissions listings 2024

Attraction	County	Visitors in 2023	Visitors in 2024
Longleat	Wiltshire	800,056	775,303
Moors Valley Country Club	Dorset	820,958	729,401
Eden Project	Cornwall	713,255	673,625
Arnos Vale Cemetery Trust	Bristol	505,162	519,073
Forestry England Haldon Forest Park	Devon	469,843	517,342
Westonbirt, The National Arboretum	Gloucestershire	473,551	476,383
St Michael's Mount	Cornwall	418,364	408,399
Stourhead House and Garden	Wiltshire	376,253	397,951

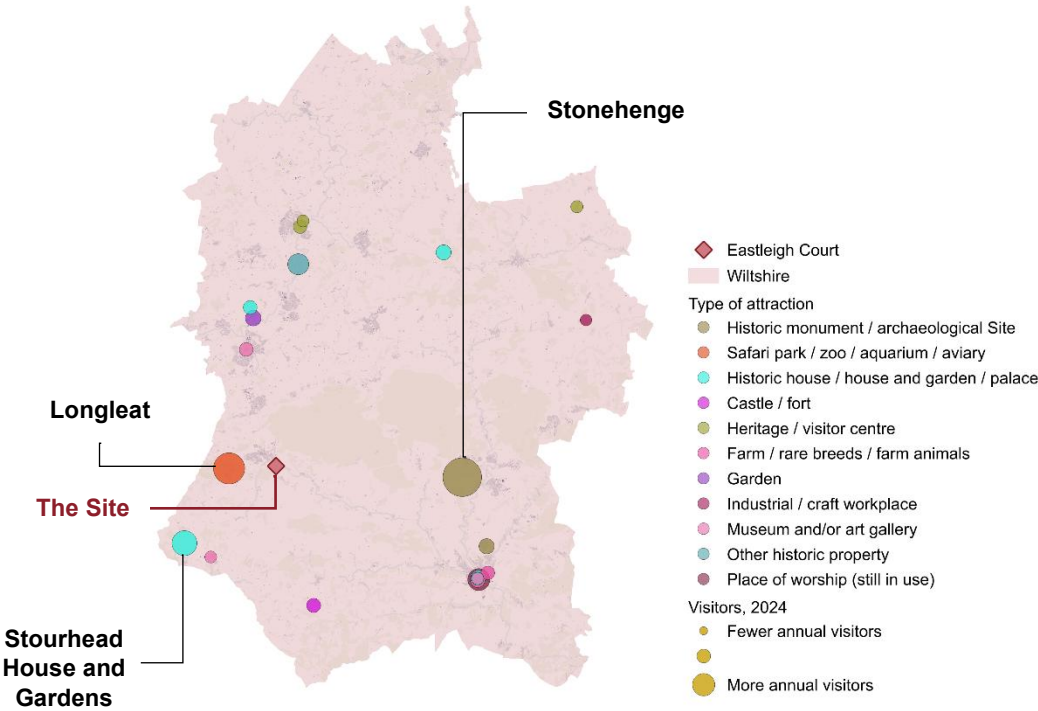
Source: VisitBritain, 2025. Annual attractions full admissions listings 2024.

5.11 Of the ten most visited attractions in the South West, three are in Wiltshire, including the first (Stonehenge) and third (Longleat) most visited in 2024.¹⁷ These assets sit amongst a diverse landscape of attractions, the prevalence of which are a determining factor in locational decisions made by visitors, who place increasing importance of the availability of opportunities for new experiences. **Figure 5.4** illustrates the location of the Proposed Development which is situated in proximity to a range of major attractions.

¹⁷ VisitBritain, 2025. Annual attractions full admissions listings 2024.

Figure 5.4 – Wiltshire has a diverse range of visitor attractions providing cultural, leisure and heritage experiences

Visitor attractions in Wiltshire; bubbles scaled by visitor numbers (2024)



Source: VisitBritain, 2025. Annual attractions full admissions listings 2024

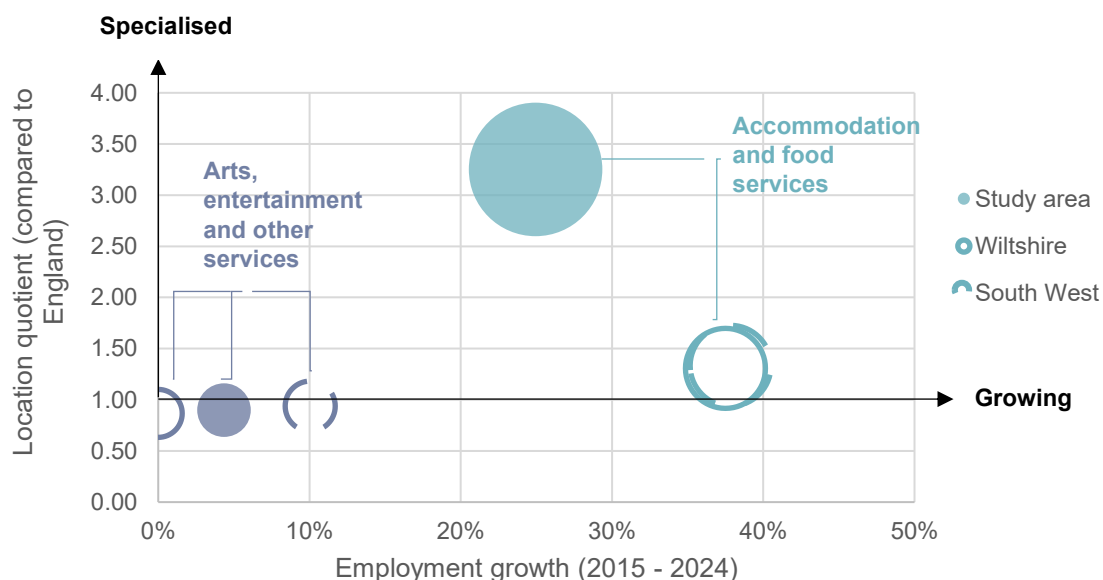
- 5.12 Location quotient analysis reveals the relative importance of a sector in an area relative to the national level, representing the degree to which the proportion of overall employment it reflects is different from the national rate. A location quotient over 1 shows that a sector is a local specialism. Based on analysis of a study area around the Proposed Development¹⁸, **Figure 5.5** shows that employment in accommodation and food services is highly specialised relative to the England average. The sector has shown considerable growth over a decade in the study area (+25%).¹⁹
- 5.13 This pattern is also evident, though to a lesser degree, at the Wiltshire and South West levels. The strength of the accommodation sector at the local scale suggests that visitor spending is already a core driver of economic activity. In contrast, arts and entertainment employment is less specialised, showing the importance of accommodation as the primary means through which tourism demand translates into local economic benefit.

¹⁸ A study area has been defined reflecting the middle super output areas Wiltshire 042, Wiltshire 043, Wiltshire 044, and Wiltshire 047.

¹⁹ Office for National Statistics, 2025. Business Register and Employment Survey 2015, 2024.

Figure 5.5 – Employment in accommodation and food services is a defining feature of the local economy of the Proposed Development

Location quotient analysis of tourism-related sectors in the vicinity of the Proposed Development compared to wider comparator geographies; including change in employment (2015 – 2024); bubbles are scaled by relative proportion of overall employment



Source: Office for National Statistics, 2025. Business Register and Employment Survey 2015, 2024.

A crucial component of the tourism and visitor economy is domestic short stays

- 5.14 Despite inbound trips generating nearly £40bn in expenditure annually for the UK, over two thirds of the tourism spending is generated through domestic trips.²⁰ This highlights the growing demand for 'staycations' since the Covid-19 pandemic as UK travellers are choosing trips that offer a cheaper and more convenient alternative.²¹
- 5.15 Domestic short stays are a crucial part of the UK's tourism and visitor economy with **over 26% of the nation's tourist spend coming from domestic overnight stays**.²² While international tourism often attracts the most attention, it is domestic travel that underpins year-round demand that supports rural and non-core destinations. Domestic tourism also provides resilience to external shocks such as economic uncertainty, currency fluctuations that discourage inbound travel from international origins, and changes in international travel patterns. This was clearly demonstrated as a feature of the coronavirus pandemic where inbound tourism spend fell from over £1.3bn in 2019 to just £201m in 2020 and £245m in 2021.²³

²⁰ VisitBritain, 2026. Economic Value of Tourism

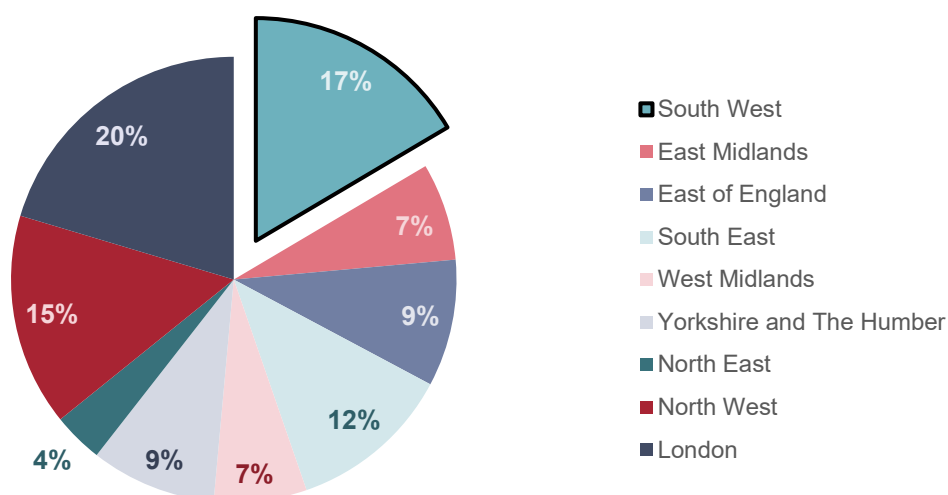
²¹ Cottages.com, 2025. Why UK staycations are here to stay

²² VisitBritain, 2026. Economic Value of Tourism

²³ VisitBritain, 2025. Inbound visits and spend: annual, regional

Figure 5.6 – Over 15% of the value of overnight trips to the UK economy are contributed by the South West region

Total value of regional overnight trips 2024 (England) (% of total)



Source: VisitBritain, 2025. GBTS, domestic overnight trips 2022 to Q3 2025

5.16

The popularity of short stay breaks, typically lasting one to three nights, reflects changing travel behaviour and lifestyle preferences. Short stays appeal to visitors because they offer a convenient way to combine relaxation and leisure with busy working lives, providing a sense of escape without the time and cost commitment associated with longer holidays.²⁴ **For many the main attraction is the access to memorable experiences, including distinctive countryside settings, high-quality accommodation, and food and drink offers.** This format is well suited to modern working patterns and has been reinforced by growing preferences for experiences over possessions.²⁵ Reflecting this growing demand, spend on overnight trips in England in 2024 was 5% higher than in 2023 and 3% above 2022 levels.²⁶ This trend is further evidenced by VisitBritain research which found that in the 12 months leading up to their survey, **over 64% of respondents took an overnight UK short break or holiday in that year.**²⁷

5.17

Further recent research indicates that UK holidaymakers are leaving it later to book shorter trips, often opting for destinations closer to home.²⁸ Booking.com reports that the numbers of users searching in July 2025 for UK trips available within the following six weeks was 23% higher than in the previous year. Airbnb also further noted that 'guests are again choosing quieter, more affordable destinations'. Together, these findings suggest a shift towards more frequent, short notice domestic trips, particularly to non-core rural destinations²⁹.

²⁴ VisitBritain, 2025. Great Britain domestic overnight trips: latest results

²⁵ Savills, 2026. Experience-led economy: When experience becomes the currency

²⁶ VisitBritain, 2025. Great Britain domestic overnight trips: latest results

²⁷ VisitBritain, 2025. Domestic sentiment tracker

²⁸ BBC, 2025. Britons booking 'later, closer, shorter' UK breaks

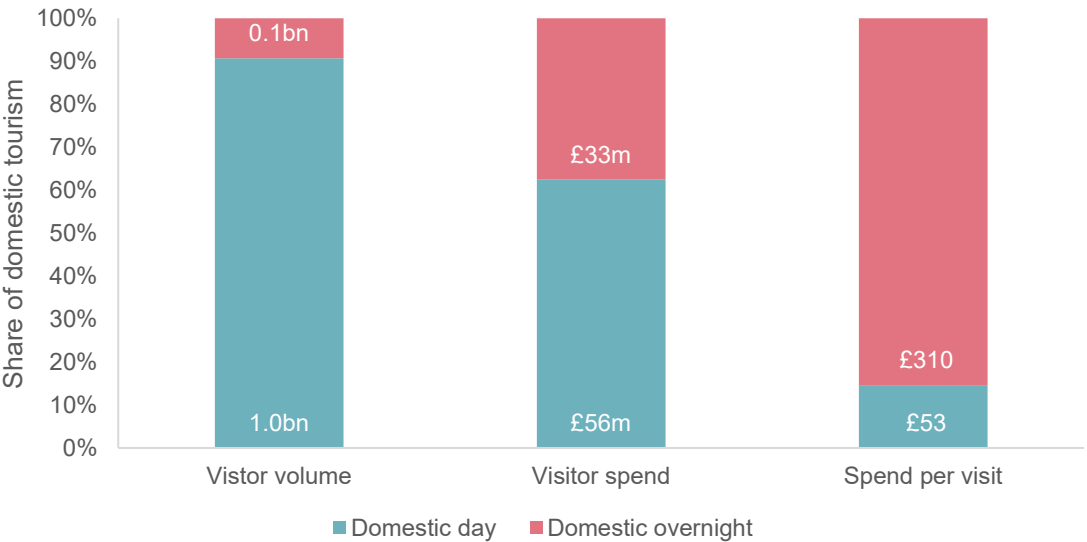
²⁹ Out of Eden, 2024. UK guest survey: Accommodation preferences revealed

5.18 Despite their shorter duration, domestic short stays make a significant economic contribution to the UK. In 2024, nearly 108 million domestic overnight trips were taken, generating approximately £33.4bn in visitor expenditure³⁰. While average spend per trip is typically lower than for inbound holidays, the scale and frequency of short stays result in a substantial cumulative economic impact. This generally comes through supporting accommodation providers, food and drink businesses, visitor attractions, and local services across the country.

5.19 While most domestic trips are day visits (91%), the average spend per visit, and therefore the economic contribution, tends to be much lower than for overnight visits. Day visits have an average spend of approximately £53 per visit, compared to around £310 for overnight visits. Therefore, **although overnight visits make up a smaller proportion of visits, they are of substantially higher value per visit** (see Figure 5.7).

Figure 5.7 – Domestic overnight tourism generates substantially higher value per visit compared to domestic day tourism (5.8x higher)

Domestic day compared to domestic overnight tourism impacts in UK, 2024



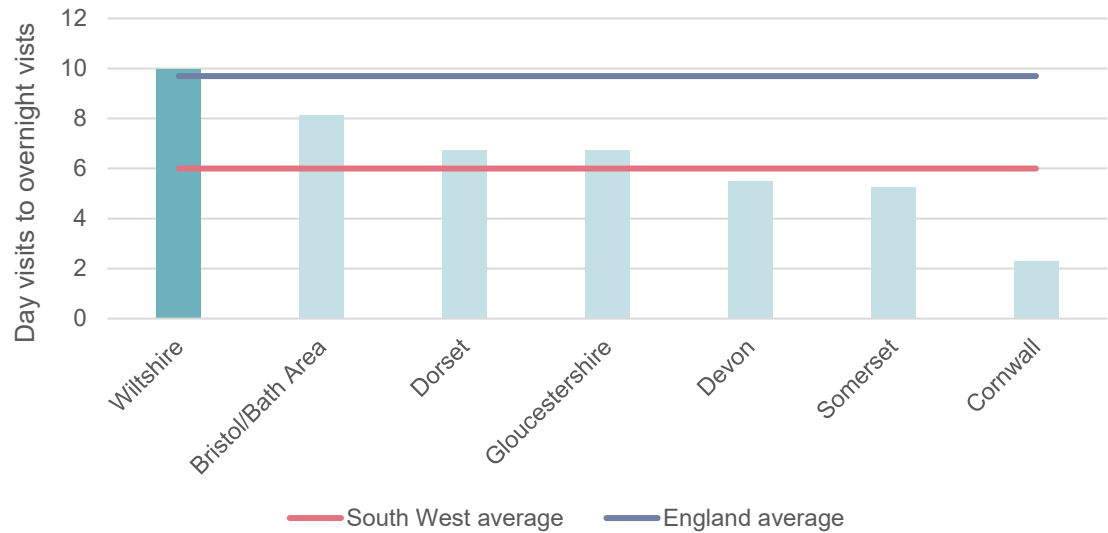
Source: VisitBritain, 2026. Economic Value of Tourism Data.

5.20 The visitor spending profile shows that domestic overnight tourism generates significantly higher expenditure per visit than domestic day tourism, reflecting higher spend on accommodation alongside wider food, retail and leisure activity. However, **Figure 5.8** shows that Wiltshire has the highest ratio of day visits to overnight visitors of any county in the South West, at around ten day visits for every overnight stay.³¹ While this reflects the popularity and accessibility of the county area’s largest visitor attractions, it also indicates that a large proportion of visitor activity does not currently translate into higher value overnight spend. This highlights a clear opportunity to increase the economic value generated by existing visitor demand by supporting a greater proportion of staying visitors, rather than relying predominantly on day trips.

³⁰ VisitBritain, 2026. Economic Value of Tourism
³¹ VisitBritain, 2025. Domestic tourism statistics for England Counties, 2022 to 2024.

Figure 5.8 – There are ten times more day visits that overnight stays in Wiltshire

Ratio of day visits to overnight stays by county in the South West region (2024)



Source: VisitBritain, 2025. Domestic tourism statistics for England Counties, 2022 to 2024.

Guests are increasingly seeking experiential and higher quality activities and accommodation

- 5.21

The visitor economy is being shaped by a now established shift in consumer preferences towards experiences rather than material goods. Over recent decades, this has seen consumers place greater value on memorable activities, events and shared occasions than on physical possessions.³² This is demonstrated clearly by a recent Barclays survey in which **one in four UK consumers (24%) responded that they expected to spend more on memorable experiences and events in the summer of 2025 than they did in the previous year.**³³ This is especially evident in the short stay market, where trips are often taken with a specific experience or occasion in mind rather than as a routine holiday.
- 5.22

Barclays analysis of the last 10 years of consumer spending further showed that this shift towards experiential consumption is being sustained over time and is increasingly focused on quality and emotional value.³⁴ Consumer research shows that **63% of UK adults would rather talk about an experience than something they have bought.**³⁵ Hospitality and leisure’s share of total consumer spending peaked at 37% in August 2024 and expenditure on travel has recorded four consecutive years of growth since March 2021. Despite financial pressures and the cost-of-living crisis, UK consumers continue to prioritise ‘memory making’ activities such as short breaks, events, and cultural experiences. Importantly, this trend is

³² Savills, 2026. Experience- led economy: When experience becomes the currency
³³ Barclays, 2025. The experience economy: moments over materials
³⁴ Barclays, 2025. The experience economy: moments over materials
³⁵ Barclays, 2025. The experience economy: moments over materials

accompanied by rising expectations around quality and value with consumers showing a clear willingness to invest in experiences that feel rare, meaningful, and of high quality.³⁶

- 5.23 Growth in demand for experiences has a resultant effect on the demand for accommodation that forms part of the experience itself. Accommodation choice can play an important role in locational decision making, particularly where visits are motivated by specific occasions or experiences.³⁷ As consumers' experience has become more selective, accommodation is no longer considered a secondary component of a trip but instead as an integral part of the overall experience. This shift has been reflected in the wider economic commentary, with analysts noting that 'luxury goods are out, but luxury travel is in'.³⁸ This highlights a reallocation of discretionary spending towards premium travel experiences rather than material consumption. In terms of short stay and occasion led travel this is particularly relevant as setting, character, and service quality are central to visitor decision making. Therefore, development which offers a unique sense of place and flexible experiences are well aligned with the current and emerging demand trends.

Preference for higher quality is driving demand for luxury and/or unique accommodation

- 5.24 Visitor preferences are increasingly shifting towards higher quality, experience-led accommodation. **Experiences are now the key driver of the destination choice of luxury travellers.** Evidence suggests that 75% of luxury travellers prioritise historic and cultural experiences, followed by food (66%), wellness (56%) and nature-based experiences (56%).³⁹ These preferences reinforce the importance of accommodation that can offer a distinctive setting and provide access to a broader visitor experience beyond the physical accommodation. Luxury is often characterised less by scale and more by privacy, character, service, and setting. This reflects the wider changes in lifestyle and travel behaviour and can be observed in the choices of affluent and time-poor visitors who are seeking memorable short breaks that deliver wellbeing and exclusivity.⁴⁰
- 5.25 Research from Savanta finds that nine in ten UK millionaires are planning to spend on luxury travel in 2026.⁴¹ This shift is also evident in wider market behaviour with **online searches and website traffic for 'unusual places to stay' increasing by 242% between 2023 and 2024.**⁴² This clearly indicates rapidly growing interest in distinctive and non-standard accommodation offers. Together, this evidence reinforces that there is enduring demand for bespoke, high-quality accommodation that offers privacy, flexibility, and character instead of larger standardised hotel provisions.
- 5.26 The same research highlights the growing importance of time for high-net-worth individuals, with over half of UK millionaires stating that they would choose more time over purchasing more luxury items.⁴³ This has clear and distinct implications for domestic tourism as it shows a clear demand for luxury experiences within the UK that offers an equivalent experience to overseas destinations without the associated time costs of long-haul travel. Well-located rural settings are particularly attractive in this context as UK residents look for an opportunity to reset and relax somewhere that provides seclusion and a sense of escapism, whilst being within a manageable journey time.

³⁶ Savills, 2026. Experience- led economy: When experience becomes the currency

³⁷ McKinsey & Company, 2024. The evolving role of experiences in travel

³⁸ The Economist, 2025. Luxury goods are out, but luxury travel is in.

³⁹ PoB Hotels, 2026. The Evolution of Luxury

⁴⁰ Savills, 2026. Experience- led economy: When experience becomes the currency

⁴¹ Savanta, 2025. Beyond possessions – New trends driving luxury travel for UK millionaires

⁴² Savills, 2025. Holiday accommodation.

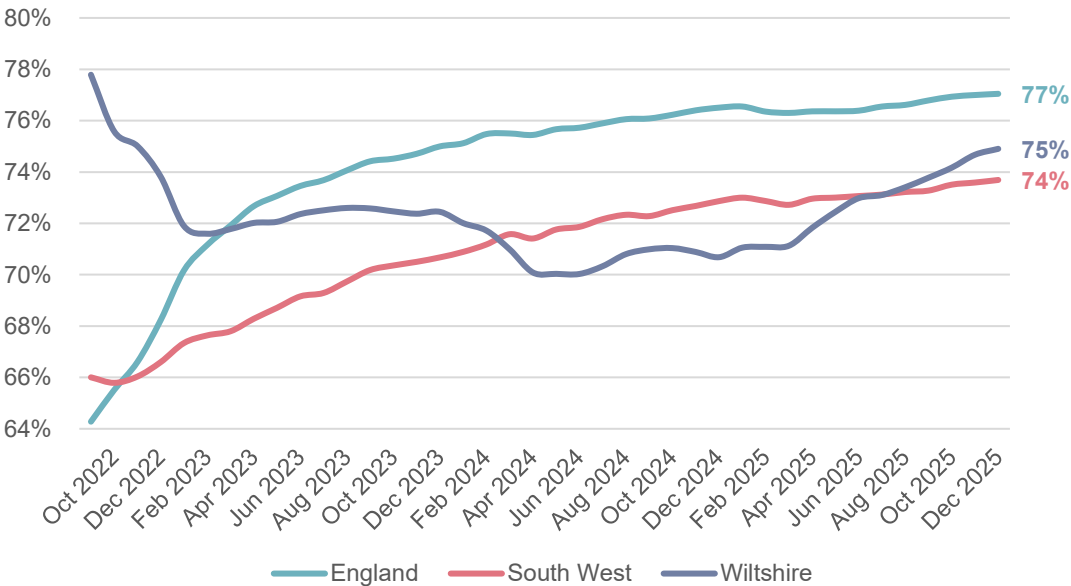
⁴³ Savanta, 2025. Beyond possessions – New trends driving luxury travel for UK millionaires

5.27

This shift in visitor preferences is reflected in recent occupancy trends for higher quality hotels. The time series data in **Figure 5.9** shows that occupancy rates for higher end accommodation (comprising upscale, upper upscale and luxury) have increased steadily since 2022 at the UK, South West and Wiltshire levels, reflecting respective post-coronavirus pandemic recovery trends.⁴⁴ While Wiltshire has historically recorded higher occupancy than the national average, the data indicates that following a slight dip, a marked uplift in 2025 narrowed the gap with both the South West and the UK as a whole. This convergence suggests strengthening demand for higher quality accommodation within the local authority area, consistent with wider national trends towards premium and experience led travel. The upward trajectory across all geographies provides further evidence that demand for higher quality accommodation is growing rather than static, including in locations that have traditionally supported lower levels of overnight stays.

Figure 5.9 – Higher end accommodation shows increasing occupancy and therefore demand over time

Occupancy rating for higher end (upscale, upper upscale, and luxury) accommodation (% , 2022 – 2025), with date range chosen to demonstrate the respective post-coronavirus pandemic recoveries



Source: CoStar, 2026.

5.28

Further insight is provided by comparing occupancy trends for higher end and midscale accommodation within Wiltshire. The data shows a clear convergence between the two classifications over time, driven by rising occupancy in higher end accommodation category alongside a gradual decline in midscale occupancy.⁴⁵ This suggests a shift in demand within the local authority area towards higher quality provision rather than uniform growth across the accommodation market. The South West comparison also shows this pattern. While midscale occupancy across the region has remained broadly stagnant, higher end accommodation has continued to record sustained growth in occupancy levels. Occupancy rates as a proxy

⁴⁴ CoStar, 2026.

⁴⁵ CoStar, 2026.

for demand points to a structural change in visitor preferences, with **demand increasingly concentrated in higher quality accommodation, both within Wiltshire and across the wider region.**

Luxury accommodation leads to considerable local economic benefit

- 5.29 The luxury sector makes a substantial and growing contribution to the UK economy. A Walpole report estimates that the UK luxury industry is worth £81bn per annum and supports approximately 450,000 jobs nationally.⁴⁶ The same report also found that luxury-related activity accounted for around 3.7% of UK GDP in 2022, having grown by 69% over the preceding five years. Looking forward, the same research forecasts that British luxury could contribute as much as £125bn per year to the UK economy by 2028. This sustained growth provides important context for understanding the role of luxury accommodation within the wider visitor economy.
- 5.30 A defining feature of visitors that use luxury accommodation is the higher level of visitor spend, a significant proportion of which typically occurs within the local economy. Walpole find that high spending tourists visiting London, defined as those staying at five-star hotels, typically spend **14 times more than average visitors**, and contribute £30bn to the UK economy per annum.⁴⁷ By extension it is likely that those staying in high-end, luxury accommodations across the UK are likely to spend considerably more than the average visitor over the course of their stay. In rural and semi-rural locations, much of this spend is likely to be retained locally as visitors support independent local businesses such as pubs, restaurants, farm shops, local producers and specialist service providers. Higher levels of visitor spend translate directly into greater economic output and employment supported per stay. Luxury short stay accommodation therefore provides a mechanism for supporting local jobs and businesses, especially where **(uplifted levels of) visitor spend extends beyond the accommodation itself into the surrounding area**, given higher spending visitors generate more economic activity per visit than the average tourist.⁴⁸ There are over 120 premises that accommodate uses that relate to the visitor economy (retail, hospitality and leisure) within a 15-minute drive of the Proposed Development.⁴⁹ Within a 30-minute drive, there are 560 applicable premises.

⁴⁶ Walpole, 2024. Luxury in the making

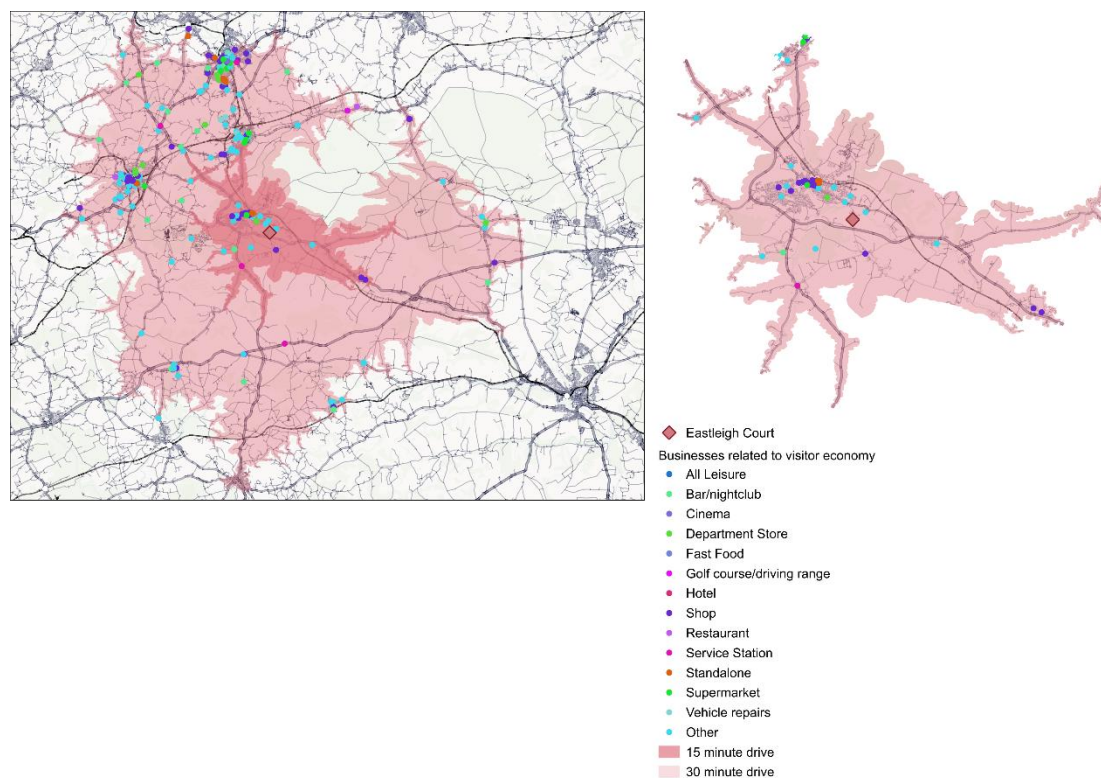
⁴⁷ Walpole, 2025. The state of London luxury 2025

⁴⁸ VisitBritain, 2026. Economic Value of Tourism

⁴⁹ CoStar, 2026. Volterra analysis.

Figure 5.10 – There are over 120 visitor economy premises, including 70 shops within a 15-minute drive of the Proposed Development

Premises in use related to the visitor economy within 15-minute and 30-minute drive catchment of the Proposed Development



Source: CoStar, 2026. Volterra mapping.

To capture these benefits, there is an acute need for more accommodation and capacity to improve the quality of the offer in this location

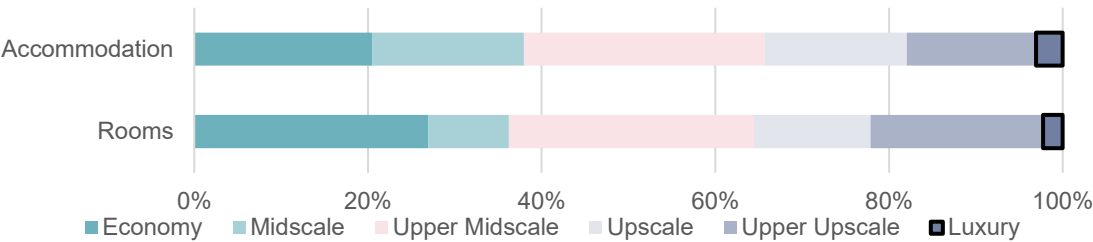
- 5.31 Tourism plays an important role in local and regional economies through its contribution to employment, business turnover and visitor spending, particularly where it supports overnight stays rather than day visits. As set out earlier in this chapter, visitor demand is increasingly shaped by preferences for higher quality, experience-led travel, with accommodation forming a central part of destination choice rather than a secondary consideration.
- 5.32 Despite these trends, the current supply of luxury accommodation in Wiltshire remains limited. **Figure 5.11** shows that **of the approximately 5,800 rooms in Wiltshire, only around 2% fall within the luxury category** (compared to 4% regionally and 6% nationally).⁵⁰ Similarly, just 3% of the local authority area's 195 accommodation premises are classified as luxury accommodation (compared to 4% regionally and

⁵⁰ CoStar, 2026.

nationally). This indicates that the existing accommodation stock is heavily weighted towards midscale and lower quality provision, with very limited capacity at the premium end of the market.

Figure 5.11 – Only 3% of accommodation and 2% of rooms in Wiltshire are considered luxury

Breakdown of accommodation and rooms in Wiltshire by classification (2026)



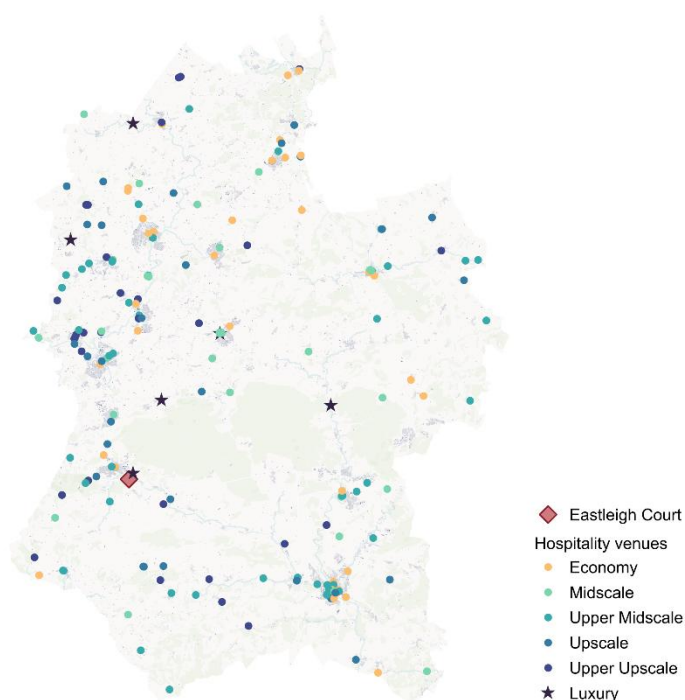
Source: CoStar, 2026.

5.33

Figure 5.12 shows that spatially luxury accommodation can be scarce and is unevenly distributed across the county. On the other hand, midscale provision is widespread and dominant. While Wiltshire supports a substantial volume of visitor activity (**Table 5.2**), it is potentially constrained in its ability to cater for higher value demand that prioritise quality, setting and distinctive experiences. In the absence of a sufficient range of types of accommodation, **there is a risk that this demand will either be displaced to other locations or absorbed by accommodation that does not fully align with visitor expectations**, limiting the economic value captured locally. To translate growing demand into economic benefit, including higher visitor spend, longer stays and stronger links with local supply chains, additional accommodation capacity that improves the quality of the offer is required.

Figure 5.12 – Luxury accommodation is scarce across Wiltshire

Distribution of accommodation in Wiltshire by classification (2026)



Source: CoStar, 2026. Volterra mapping.

Rural diversification and reuse of heritage assets are highly supported by national, regional and local policy

- 5.34 National planning policy provides clear support for rural diversification and the reuse of existing buildings in the countryside. There is an emphasis on encouraging proposals that help to support economic vitality and secure the long-term future of heritage assets. The NPPF places significant weight on supporting economic growth, including in rural areas, recognising **the importance of creating conditions in which businesses can adapt, expand and diversify** in response to changing market conditions.⁵¹
- 5.35 In rural locations specifically, the NPPF acknowledges that developments which represent the optimal viable use of heritage assets, or which reuse redundant or disused buildings, may be appropriate even when it would otherwise be considered isolated development in the countryside.⁵² This policy position directly recognises that new, economically viable uses are often essential to the long term conservation of heritage assets, particularly where their original use is no longer viable.
- 5.36 The national approach is reinforced through the Wiltshire Core Strategy, which places strong emphasis on supporting a resilient rural economy and the appropriate reuse of rural buildings. Core policy 48 (Supporting Rural Life) explicitly supports the conversion and re-use of rural buildings for employment, tourism, and

⁵¹ MHCLG, 2025. National Planning Policy Framework

⁵² MHCLG, 2025. National Planning Policy Framework

cultural and community uses.⁵³ This is, however, contingent on the premise that the buildings in question are structurally capable of conversion, that the character of the building and its landscape setting are preserved, and that the reuse would lead to the viable long-term safeguarding of a heritage asset. The policy also recognises that insensitive reuse can be harmful and therefore reinforces the importance of high quality, carefully considered schemes instead of simply resisting change in principle. This emphasis on quality and character aligns with the visitor offer present in the Visit Wiltshire Visitor Guide, which consistently highlights distinctive accommodation, historic settings and characterful places to stay as central to Wiltshire's appeal as a visitor destination.⁵⁴

- 5.37 More broadly, the Core Strategy identifies tourism as a key component of Wiltshire's economic future and explicitly supports **growth in the tourism sector as it is essential in developing more resilient rural communities** and a thriving county-wide economy.⁵⁵ The strategy highlights the role of tourism development and accommodation in supporting local employment, reducing out-commuting and strengthening the vitality of market towns. This is reflected in the Visit Wiltshire Visitor Guide, which places strong emphasis on Wiltshire's historic towns and villages as destinations offering heritage, countryside access, and opportunities for overnight stays.⁵⁶
- 5.38 The adopted policy framework at national, local authority and neighbourhood level provides a basis for supporting rural diversification through the sensitive reuse of heritage assets. Proposals that bring underutilised historic buildings back into viable use, support tourism and leisure activity, and secure long-term stewardship of heritage assets align closely with the objectives of planning policy. This support is particularly strong where development avoids unnecessary new build in the countryside, respects landscape character, and delivers demonstrable economic and community benefits.

Events are a significant driver of alternative incomes

- 5.39 Heritage buildings and the rural economy both seek diversified revenue sources through hosting events. Events and private celebrations represent a significant and resilient source of economic activity, with the UK's event industry having an estimated annual value of over £61bn in 2024.⁵⁷ Weddings are one of the largest single components of the events market, with total annual expenditure across the UK in 2018 estimated to exceed £10 billion.⁵⁸ This expenditure is spread out across venue, outfit, gifts, and accommodation costs.
- 5.40 In 2024, the average cost of a UK wedding was approximately £23,250, with venues accounting for around 50% of total spend.⁵⁹ Typical venue hire costs now commonly range between £9,000 and £11,000, with exclusive use venues that offer accommodation and attractive settings being at the higher end. Average guest numbers are around 80-100 attendees, meaning each event brings temporary guests to the host location, **many of which will spend in the local area through purchasing accommodation and visiting local businesses such as pubs, restaurants and farm shops on the days leading up to or after the event.**

⁵³ Wiltshire Council, 2015. Wiltshire Core Strategy

⁵⁴ Visit Wiltshire, 2025. Visitor Guide

⁵⁵ Wiltshire Council, 2015. Wiltshire Core Strategy

⁵⁶ Visit Wiltshire, 2025. Visitor Guide

⁵⁷ UK Events, 2024. UK Events Report

⁵⁸ University of Birmingham, 2018. Markle Sparkle and the Royal Wedding 2018: Frocks, Rocks and the Local Economic Impacts of Weddings

⁵⁹ Savills, 2025. Weddings

- 5.41 This off-site spillover generated by guests is a key characteristic of weddings. Research from the Money & Pensions service indicates that **guests spend on average £692 per wedding attended**, with the largest elements including travel and accommodation (£147 per guest), clothing (£136) and wedding gifts (£117).⁶⁰ This results in substantial spending in nearby hotels, short stay accommodation, transport services, and retail and hospitality businesses. This is particularly relevant where not all guests can be accommodated or catered for on site, as is the case for Eastleigh Court.
- 5.42 Rural and destination venues are increasingly well placed to capture this demand as couples show a strong preference for distinctive settings which offer a unique experience. The UK Wedding Industry Report from 2023 shows that **61% of couples who have booked a venue chose an exclusive-use venue**, while 58% actively prefer venues that host only one wedding per day.⁶¹ In addition, around two thirds of couples choose to hold their ceremony and reception in the same location, supporting longer stays and increased on-site and off-site expenditure, a pattern typically associated with destination style venues rather than urban function spaces.
- 5.43 These preferences position rural and heritage venues as particularly well placed to capture this demand, therefore helping to diversify rural economies, support local supply chains and sustain historical assets. In the absence of such event-led uses, opportunities to attract high-value visitors and the associated spillover spending would be significantly reduced, hence limiting the wider economic benefits to the surrounding area.

The events sector supports a diverse range of employment

- 5.44 The events sector supports a diverse range of employment. Events are inherently labour intensive and rely on a **wide ecosystem of roles and businesses**: an ecosystem that includes planning and management, venues, catering and hospitality, audio visual and staging services, entertainment, event technology, decor and design, logistics and transport, security and health and safety, marketing and public relations, event staffing, photography and videography, printing and signage, and travel and accommodation services.⁶² National evidence illustrates the scale of this employment footprint. BVEP's UK Events Report estimates that the UK events industry supported over 700,000 jobs in 2019, with £70bn of direct spend which was equivalent to over half of the UK visitor economy spend in that year.⁶³ This highlights the events market's capacity to sustain both on site roles and extensive local and national supply chains.
- 5.45 More recent sector specific research reinforces the employment significance of business events and exhibitions. The Events Industry Alliance reported that business events contributed £10.9bn to the UK economy in 2023 and supported 114,000 jobs.⁶⁴ Their subsequent 2024 study indicates continued growth, with business events adding £11.5bn in 2024 and supporting over 126,000 jobs.⁶⁵ Alongside this, the wider hospitality labour market remains substantial, and closely linked to events delivery, with UK Hospitality describing the sector as the UK's third largest employer, with 3.5 million people working in the industry.⁶⁶
- 5.46 An important feature of events employment is that it is diverse in type and accessibility. It includes permanent, year-round roles alongside flexible and seasonal opportunities. The UK Events Report 2024 notes that employment patterns have evolved post pandemic, including a shift towards freelance roles and

⁶⁰ Money & Pensions Service, 2025. UK adults spending over £2000 a year to attend weddings and civil partnerships

⁶¹ Wedding Dates, 2023. UK Wedding Industry Report

⁶² UK Events, 2024. UK Events Report.

⁶³ BVEP, 2020. The UK Events Report

⁶⁴ Events Industry Alliance, 2023. Economic Impact of Exhibitions in the UK

⁶⁵ Events Industry Alliance, 2023. Economic Impact of Exhibitions in the UK

⁶⁶ UK Hospitality, 2023. The economic impact of hospitality in the UK

changes in the geography of jobs, including movement away from London to other regions.⁶⁷ This mix **can support different working patterns and skill levels, from entry level work and apprenticeships through to highly skilled technical and creative professions.**

Beautiful places are increasingly sought to host events

- 5.47 Recent consumer and business trends point to a clear shift towards distinctive, scenic settings for events and private celebrations. Rural and destination-style venues offer privacy, exclusivity, and high-quality experiences and are therefore able to capture the current demand for such event spaces. National evidence from Bridebook's 2024 UK Wedding Report highlights the popularity of countryside and destination-style venues for weddings. **Barns and country houses are now among the most popular wedding venue types, with 21% and 15% of weddings taking place in these venues respectively.**⁶⁸ Their research also finds that around one third of UK weddings take place in the South East and South West, and fewer than half of London residents now marry in London. This clearly indicates a strong willingness amongst those getting married to travel to attractive rural locations. Venue choice is increasingly driven by exclusivity, setting and the ability to offer an all-in-one experience which includes outdoor ceremonies and on-site accommodation, factors that favour rural and estate-based venues.
- 5.48 A similar dynamic is evident in corporate and business events, where organisers are increasingly looking beyond standard hotel conference rooms and city centre space. The UK Conference and Meeting Survey (UKCAMS) estimates there were around 1.08 million conferences and meetings in 2024, generating £19.3bn of direct expenditure in venues and wider destinations.⁶⁹ Most notably, UKCAMS reports that **'unusual/multi-purpose venues' accounted for 29% of events in 2024 aligning with demand for more characterful settings.** This is a broad category that includes visitor attractions, historic buildings, and other non-standard business venues. It supports the argument that place quality and venue distinctiveness are increasingly important drivers for venue choice not just in terms of leisure events.

Events, celebrations and gatherings have an important role in bringing people together

- 5.49 Events and shared occasions play a practical role in sustaining social connection at a time when loneliness remains a pressing issue nationally. In England, the Community Life Survey reports that **7% of adults feel lonely 'often or always', emphasising how crucial anything that helps bring people together could be to improve living standards and wellbeing.**⁷⁰ Further survey statistics also highlight that feelings of belonging vary by age groups, with only 51% of 25-34 year olds feeling they belonged strongly to their neighbourhood.⁷¹ This implies a particular value for welcoming spaces and occasions that encourage chance encounters and socialising with new people. This also supports the observation that events and shared experiences can act as bridges, creating low-pressure reasons for people to spend time together. Evidence from studies on cultural engagement also suggest such activities are linked to significant improvements in life satisfaction and self-assessed health, underscoring the broader wellbeing benefits of social gatherings.⁷²

⁶⁷ UK Events, 2024. UK Events Report

⁶⁸ Bridebook, 2024. UK Wedding Report

⁶⁹ UKCAMS, 2025. Conference and Meeting Survey

⁷⁰ Department for Culture, Media and Sport, 2025. Community Life Survey 2024/25 annual publication

⁷¹ Department for Culture, Media and Sport, 2024. Community Life Survey 2023/24: Neighbourhood and community

⁷² Frontier Economics, 2024. Culture and heritage capital: monetising the impact of cultural and heritage on health and wellbeing

- 5.50 Beyond neighbourhood measures, there is growing evidence that participation in cultural and community activity is associated with social connection and wellbeing. One example comes from a large UK study on arts engagement and social connectedness which reported evidence consistent with arts engagement supporting social connectedness in adulthood.⁷³ This provides evidence for the role of shared cultural/leisure experiences in strengthening social ties. Supporting this, the Department for Culture, Media and Sport (DCMS) have commissioned work on culture and heritage with the aim to monetise the wider health and wellbeing benefits of cultural engagement, which reinforces that participation in social events has value beyond the immediate event itself.⁷⁴
- 5.51 Getting together in 'real life' appears to be a continuing behavioural trend, especially among younger adults. Eventbrite's recent social study reports that **79% of 18-35 year olds plan to attend more events in 2026**, pointing to a growing preference for in person experiences that feel more 'human' in an age where more interactions are being held online.⁷⁵ Despite being commercial research, this provides a useful indicator of growing demand for shared experiences and gathering-based leisure. Additionally, research suggests that arts and cultural engagement lead to significant improvements in mental health, including reductions in depression and anxiety.⁷⁶ This highlights the psychosocial benefits of such gatherings, making them even more important in today's online orientated society.

Structural shifts in office demand and occupier requirements

- 5.52 Recent trends in the office vacancy rates provide a clear local and regional context for the proposed conversion of Eastleigh Court. As shown in **Figure 5.13**, office vacancy rates in Wiltshire, the South West, and England have increased significantly since 2020.⁷⁷ In Wiltshire, vacancy rates have risen from a low 3.1% in 2019 to a high of 9.8% in 2024. This represents a sustained increase rather than a short-term fluctuation. A similar pattern is evident across the South West and England as a whole, although Wiltshire has consistently recorded higher vacancy rates than the regional and national averages over recent years. The scale and persistence of these vacancies indicate a structural weakening in demand for office space.

⁷³ BMC Public Health, 2021. Arts engagement supports social connectedness in adulthood

⁷⁴ Frontier Economics, 2024. Culture and heritage capital: monetising the impact of cultural and heritage on health and wellbeing

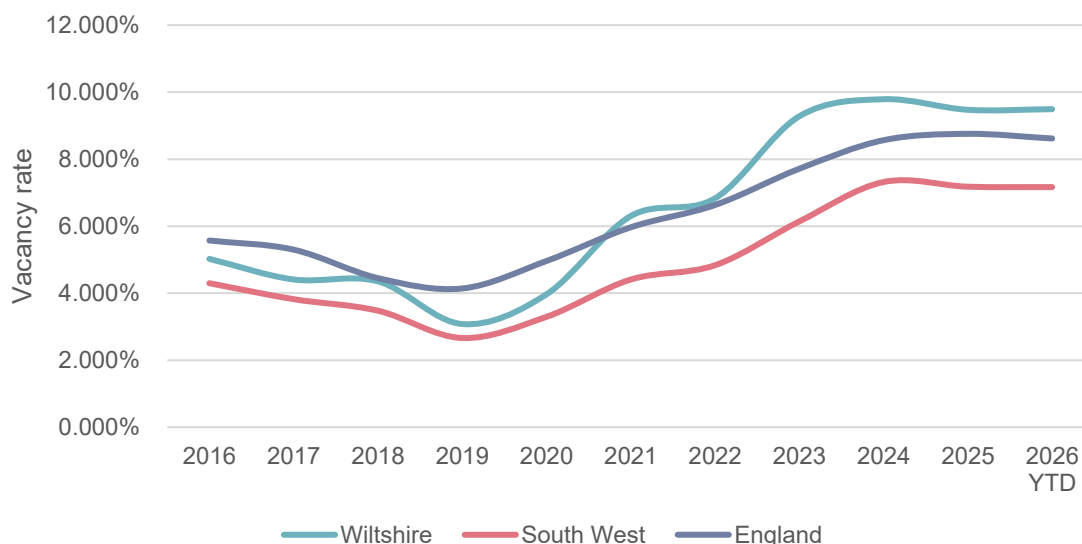
⁷⁵ Eventbrite, 2026. Reset to Real: How Gen Z and Millennials are redefining live experiences in 2026

⁷⁶ Frontier Economics, 2024. Culture and heritage capital: monetising the impact of cultural and heritage on health and wellbeing

⁷⁷ CoStar, 2026

Figure 5.13 – Office vacancy rates have been increasing over recent years

Percentage of office space that is vacant for each of England, the South West, and Wiltshire from (2016 - 2026 year to date (YTD))



5.53

Source: CoStar, 2026. A key driver of this reduction in demand for office space has been the widespread adoption of homeworking and hybrid working practices. While overall employment has recovered since the pandemic, this has not translated into a proportional recovery in office space demanded. This is demonstrated in **Figure 5.14**, where total employment has returned to pre-pandemic levels, while office vacancy has increased significantly. **Research from CIPD finds that 91% of employers say they offer some kind of flexible working arrangement.**⁷⁸ With flexible working now a normal part of office work, many organisations now require less floorspace per worker and experience lower average office utilisation across the week. **The global management consultancy AWA find that UK offices provide just 56 desks per 100 employees on average in the second quarter of 2024.**⁷⁹ This reflects a structural shift in how office space is planned and used, with floorspace increasingly sized at peak attendance rather than total employment. As a result, even in areas where labour markets remain strong, demand for traditional office accommodation has weakened.

⁷⁸ CIPD, 2025. Flexible and hybrid working practices in 2025

⁷⁹ FMJ, 2024. Research finds UK office attendance and desk use up but desk provision down

Figure 5.14 – Office vacancy rates are increasing while total employment recovers to pre-pandemic levels suggesting reduced reliance on office space

Percentage of office space that is vacant (%) and total employment (no.) in Wiltshire (2016 – 2024).



Source: CoStar, 2026. Office for National Statistics, 2025. Business Register and Employment Survey 2016, 2024.

5.54

There has also been a shift in occupier requirements towards high-performing, sustainable buildings. Recent analysis of the London office market shows that buildings with strong environmental credentials attract higher levels of occupier demand and achieve stronger rental performance, which reflects growing market preference for energy efficient and future proofed space.⁸⁰ As expectations around sustainability rise, buildings with weaker environmental performance are increasingly at risk of being perceived as lower quality or less competitive. Older and listed buildings can face inherent challenges in meeting these expectations, especially when constraints limit the integration of modern building services. As a result, buildings of this nature are at risk of functional and economic obsolescence when retained as office use. In contrast, alternative uses that align more closely with the architectural character and environmental limitations of heritage assets can offer a more viable long-term use.

The need for Eastleigh Court and Eastleigh Stables

The Proposed Development supports the visitor economy, addressing the gaps in the overnight offer

5.55

Tourism is a critical driver of the Wiltshire and South West economies, however, Wiltshire's visitor economy is currently characterised by a very high reliance on day visits rather than overnight stays. While the county hosts internationally significant attractions such as Stonehenge and Longleat, it has the highest ratio of day

⁸⁰ Adapt, 2025. Green London office space ROI: Why ESG buildings cost more but pay back faster

visits to overnight stays in the South West. This means much of the demand does not translate into higher-value local spend. Overnight visitors generate almost six times more expenditure per trip than day visitors, underlining **the importance of increasing the supply of accommodation that encourages visitors to stay longer.**

- 5.56 Despite growing demand for higher quality, experience-led short breaks, Wiltshire's accommodation stock remains heavily weighted towards mid-scale provision. Only around 2% of rooms and 3% of accommodation remises are classed as luxury, with limited spatial coverage across the county. This constrains Wiltshire's ability to capture high-value domestic demand and risks displacement of visitors to competing destinations. **The Proposed Development directly addresses this gap by providing distinctive, luxury short stay accommodation that is likely to attract higher-spending visitors and generate levels of local expenditure materially above the average short stay market.**

The Proposed Development aligns with the structure of the local tourism market

- 5.57 The local tourism economy and local employment profile around Eastleigh Court is already strongly specialised in accommodation and food services. It reflects the area's role as a visitor destination in which accommodation led tourism is the primary means through which visitor demand translates into local economic benefit. This structure means that the most effective way translate visitor demand into local economic benefit is through accommodation led tourism, which supports employment, supply chains, and year-round spending across nearby towns and villages.
- 5.58 The Proposed Development aligns closely with this structure by strengthening the accommodation offer rather than introducing a standalone events destination that is separated from the local market. Its focus on short stays, small gatherings, and experience led visits complements existing attractions and hospitality businesses. In doing so, it enables higher-value visitors to spend into local pubs, restaurants, shops, and services, reinforcing the existing tourism economy and supporting surrounding accommodation providers where on-site capacity is exceeded.

The Proposed Development supports the rural economy and secures the long-term future of heritage assets

- 5.59 Rural economies are increasingly dependent on diversification to remain resilient, particularly where traditional or historic uses are no longer viable. For Eastleigh Court, this is particularly relevant given the lack of demand for its long-term use as office space, and without sustainable alternative use the building's ongoing maintenance and conservation would remain underfunded. National and local planning policy recognises that the sensitive reuse of heritage assets for tourism and leisure can represent their optimal viable use, particularly where this enables long-term stewardship, secures ongoing investment, and aligns the future of the asset with the economic realities of its rural setting.
- 5.60 The Proposed Development provides a clear mechanism for securing the long-term stewardship of a listed asset through economically productive use. By reinvesting significant capital into restoration and enabling ongoing operation revenue, it ensures that conservation is funded in perpetuity rather than deferred. Simultaneously, it supports the wider rural economy through local employment, procurement, and visitor spending. This means that the Proposed Development can bring multiple benefits: heritage protection as well as an economically sustainable use.

The Proposed Development improves the events offering in the local area

- 5.61 The UK events market is large, resilient, and increasingly driven by demand for distinctive, destination led venues. This demand is particularly prevalent for weddings, private celebrations, and corporate retreats. Evidence shows a strong preference for exclusive use, countryside, and heritage settings, with guests generating significant off-site spend on accommodation, transport, food and drink, and retail. However, Wiltshire's existing offer is limited and highly competitive, with many comparable venues operating at larger capacities than that proposed at Eastleigh Court.
- 5.62 The Proposed Development enhances the local events offer in a controlled and proportionate way, providing a purpose-built acoustically-treated Pavilion designed to accommodate small-scale, high-quality events rather than high frequency or mass market use. By offering short stay accommodation alongside events for up to 120 guests, the scheme is well placed to translate event activity into local employment and procurement opportunities, particularly through catering, hospitality, transport, cleaning, security, and maintenance services. This model maximises local economic spillovers while minimising impacts on nearby communities reinforcing the Proposed Development's role as an accommodation-led destination rather than a standalone venue.

6. Economic impacts

Introduction

- 6.1 The Proposed Development would result in a range of economic impacts during the construction and operational phases. These impacts would have demonstrable economic and social benefits to the local economy. This section considers the economic impacts of the Proposed Development. The respective methodologies utilised in this assessment are detailed throughout this section.

Economic impacts of the Proposed Development

- 6.2 The Proposed Development, as described in the earlier section (**The Proposed Development**) is to provide the restoration and enhancement of the Grade II listed property, alongside the creation of a luxury short-stay accommodation and special events venue. The current approved use at Eastleigh Court is as offices (Class E) albeit the main building is currently vacant, and the former Eastleigh Stables are operating as short stay accommodation. The extant permission for the Site would facilitate the reinstatement of residential use at Eastleigh Court.
- 6.3 The assessment of economic impacts therefore considers two counterfactual scenarios against which the economic impact of the Proposed Development itself can be compared. It is important to compare all economic impacts to this reference case to understand additionality and accurately represent the impact of the Proposed Development itself versus a scenario in which it does not occur. The scenarios used in this assessment are:
- **Counterfactual 1**: the extant permission is implemented and Eastleigh Court is reinstated to a residential dwelling; the former Eastleigh Stables operates as short stay accommodation.
 - **Counterfactual 2**: the extant permission is not implemented and Eastleigh Court retains a commercial office function; the former Eastleigh Stables operates as short stay accommodation.
 - **Proposed Development scenario**: the Proposed Development is implemented.

Construction phase

- 6.4 The construction and operation of the Proposed Development would lead to increased economic activity through the employment generated as well as additional expenditure in the local area due to the jobs it would bring on-site. These sources of economic value are explained in more detail below.

Construction employment

- 6.5 The widely accepted method of estimating the number of construction workers on-site during the construction phase is outlined in **Figure 6.1**. It is estimated by dividing the expected cost of construction by

the Gross Value Added (GVA) of the average construction worker in Wiltshire.⁸¹ The GVA per construction worker in Wiltshire is estimated to be £68,000 in 2023.^{82,83}

- 6.6 The number of construction job years is then divided by the number of years that the construction phase is expected to last to find the number of construction workers who would be employed on average at any given point during the construction process.

Figure 6.1 – Construction employment methodology



- 6.7 It is estimated that the construction phase of the Proposed Development would support 120 construction jobs years across the 20-month construction period. This is the equivalent of **an average of 70 construction jobs** supported over the construction phase of the Proposed Development, equivalent to approximately 0.5% of Wiltshire's construction workforce.⁸⁴

Construction worker expenditure

- 6.8 Construction workers are part of one of the most mobile sectors of the workforce, travelling to wherever the work is. It is therefore considered that the local area may not have very substantial local employment benefits. However, the expenditure that construction workers bring into the area does have a local impact.
- 6.9 The Greater London Authority (GLA) reported that an average office worker in London is expected to spend £13 per day in and around their workplace as of 2020.⁸⁵ The following adjustments are made to this finding to inform the estimate for worker expenditure during the construction of the Proposed Development:
- Sector differentials for earnings of construction workers relative to office workers.⁸⁶
 - Earnings growth over 2020-2025.⁸⁷
 - Regional differentials between the earnings of an office worker in the South West relative to those working in London.⁸⁸
- 6.10 Based on the methodology above, it is estimated that construction workers would spend £10.61 per day in the surrounding area each working day. This equates to a **total spend of £272,000 in the local area**, over the duration of the construction period, equivalent to £163,000 per annum.

⁸¹ ONS, 2023. Regional gross value added (balanced) by industry 2022; ONS, 2023. Business Register and Employment Survey 2022

⁸² ONS, 2025. Regional gross value added (balanced) by industry: all ITL regions.

⁸³ ONS, 2024. Business Register and Employment Survey 2023.

⁸⁴ ONS, 2024. Business Register and Employment Survey 2023

⁸⁵ GLA, 2020. Lost worker vs. tourism expenditure in the Central Activities Zone (CAZ) during the COVID-19 Pandemic

⁸⁶ ONS, 2025. EARN03 Average Weekly Earnings

⁸⁷ ONS, 2025. EARN01 Average Weekly Earnings

⁸⁸ ONS, 2025. EARN05 Average Gross Weekly Earnings of Full-time Employees, by Region

Operational phase

Operational employment

6.11 The following terminology is used in the consideration of operational employment impacts:

- **Gross direct employment** refers to the employment⁸⁹ supported directly by the Proposed Development;
- **Gross additional employment** refers to the employment supported directly after discounting the direct employment reference case; and
- **Net additional employment** refers to the employment supported after accounting for displacement (jobs which could be supported elsewhere), multiplier and induced effects.

Gross direct employment

6.12 The Proposed Development would generate economic activity and employment within the employment-generating uses (visitor accommodation). Estimates for gross direct employment supported by these uses can be calculated by applying density benchmark employment densities from the Homes and Communities (HCA) Density Guide to the proposed floorspaces, as well as considering the staffing requirements for the proposed events.^{90,91}

Counterfactual 1

6.13 In the counterfactual 1 scenario, the residential use at Eastleigh Court is reinstated which is not anticipated to be associated with any operational employment. The former Eastleigh Stables would operate as short stay accommodation. A 'luxury hotel' employment density of 1 FTE per bed is applied per the HCA Density Guide. Visitor accommodation operates at different utilisation/occupancy ratings which affects the level of employment that might be expected to be supported by the accommodation. This is particularly relevant for a short stay accommodation model that operates on a rental basis that is different from a typical hotel. Therefore an adjustment is made to account for current occupancy (insofar as the benchmark ratio already takes into account typical operating levels and staffing levels). Once the applicable working patterns for the respective sectors of employment⁹² is taken into account, the operational employment associated with the counterfactual 1 scenario is expected to support approximately 2 FTEs, or 6 jobs.

Counterfactual 2

6.14 In the counterfactual 2 scenario, the residential use at Eastleigh Court is not implemented and the building is assumed to retain its employment-generating capacity. The former Eastleigh Stables would operate as short stay accommodation, which results in associated operational employment generated, as presented in

⁸⁹ For the purposes of this assessment, employment is measured in FTE terms and represents the equivalent level of labour input required to operate the Proposed Development. This includes all individuals engaged in delivering the activities of the development, including employees, workers and self-employed individuals, and those sometimes working remotely.

⁹⁰ HCA, 2015. Employment Density Guide, 3rd edition

⁹¹ The HCA Employment Density Guide, although now withdrawn, still represents one of the most comprehensive and widely utilised benchmark resources for the purposes of estimating employment.

⁹² The part time to full time working pattern profile for employment in 'SIC 5520: Holiday and other short stay accommodation' has been applied, based on BRES data.

paragraph 6.13. The floorspace at Eastleigh Court that has employment-generating capacity in its current Use Class E lawful use comprises approximately 655sqm (NIA).

6.15 Marketing evidence shows the lack of market interest in uptake of the office space which remained unlet for a significant period. Potential for office use is unlikely. On 3rd June 2025, a reputable national agent wrote to the Applicant explaining that in September 2023 the previous owners had appointed them to market Eastleigh Court but without success over a period of 10 months. The agent advised that ‘the challenge with this property is that, given the Court’s listed status and its geographical location, it is not really an attractive or suitable location for commercial uses. Eastleigh Court was in use as offices by the previous owner for a period of time, however owing to the poor quality of the office accommodation and the size restrictions on the floorplates, there was no interest coming forward during this marketing period’.

6.16 Different patterns of work mean that working from home and virtual/hybrid models have the potential to impact on the employment generating capacity of workspace. These influences have been addressed by considering a range of adjustments to the employment density of space:

- 2a: maximum occupation of the space – an employment density applicable to ‘Corporate’ use (13sqm per FTE) is applied;
- 2b: assuming continued obsolescence of stock such that its employment density is nil; and
- 2c: a more realistic office occupancy scenario – applying a density in line with offices in Wiltshire of a similar size (19sqm per FTE) and making an assumption that it would only be utilised at a rate of 65% due to its layout limitations and unmarketability (aligning with the Wiltshire building vacancy rate for similar offices that are partly vacant).^{93,94}

6.17 Once the applicable working patterns for the respective sectors of employment⁹⁵ are taken into account, and the employment estimates for accommodation component at the former Eastleigh Stables which occurs in all permutations is added, the operational employment associated with the counterfactual 2 scenario is expected to be between 2 – 52 FTEs, and 6 – 80 jobs.

Table 6.1 – Gross direct employment (counterfactual 2)

Office occupancy	FTEs	Jobs
2a: Full	52	80
2b: Ongoing obsolescence and complete vacancy	2	6
2c: Ongoing obsolescence and reasonable expected vacancy	25	39

Proposed Development scenario

Employment supported by the visitor accommodation

6.18 In the Proposed Development scenario, Eastleigh Court is brought into visitor accommodation use, and the former Eastleigh Stables also operates as visitor accommodation use. The operation of the Proposed

⁹³ CoStar, 2026. Volterra analysis.

⁹⁴ Of the office buildings in Wiltshire of a similar size and quality to Eastleigh Court, those which have some amount of vacancy have a vacancy rate for the overall building of 35% on average.

⁹⁵ The part time to full time working pattern profile for employment in broad industrial groups J,K,L,M and N has been applied, based on BRES data.

Development assumes that the former Eastleigh Stables accommodation is utilised at an optimised occupancy level in line with the Eastleigh Court accommodation. Applying similar assumptions about occupancy and working patterns for the applicable sector of employment as before and the operational requirements of the accommodation component, results in operational employment generation of 10 FTEs, or 17 jobs. This accounts for those on-site roles and operational roles.⁹⁶

Employment supported by the events

- 6.19 The operational model, which responds to the rural setting within Bishopstrow favours domestic character short stays that favour meaningful, quality, situated experiences on-site over more transient visiting patterns that standard hotels would more likely bring. Therefore the operating model of the Proposed Development has been thoughtfully developed to balance the needs of the local community with ensuring an economically viable asset for the local economy is secured over the long term. Accordingly, the operating model places an upper limit on different types of event (each of differing guest numbers) to balance the use of the Site sensitively over the course of a year.
- 6.20 Due to the nature of the operation of the short stay accommodation with events capability, the relationship between the event floorspace does not straightforwardly relate to employment density benchmarks. A different approach is therefore used to translate the operations of the Proposed Development into comparable jobs and FTEs generated in order to facilitate comparison of economic impacts with the counterfactual scenarios. This approach instead considers the labour intensity of events of different sizes (corresponding with stay types A, B, and C as set out in **Table 3.1**) and their proposed frequency throughout the year.
- 6.21 The estimates incorporate information provided by the Applicant about the hours required per event per role across catering, management, hosting, and security functions. This information is converted into FTEs by normalising against the hours in a working year and converted into jobs through consideration of the working patterns of the applicable sector of employment.⁹⁷

Table 6.2 – Gross direct employment (Proposed Development, events element)

Stay type	FTEs	Jobs
A	5	7
B	2	3
C	4	5
Total	11	15

⁹⁶ Operational roles which are additional to the benchmark-derived roles are included on the basis that the Proposed Development directly supports the labour input for its operation and functioning. These have been calculated using input from the Applicant about the respective labour requirement across specific business administration and support roles.

⁹⁷ Sectors of employment used for this purpose included: '83202: Activities of conference organisers', '79909: Other reservation service activities (not including activities of tourist guides)', '56302: Public houses and bars', '56210: Event catering activities', '55900: Other accommodation', and '80100: Private security activities'.

Total gross direct operational employment

6.22

The total gross direct operational employment generated by the counterfactual and Proposed Development scenarios is summarised in **Table 6.3** below. This reflects the employment that would be directly supported in each scenario. Whilst the very optimistic scenarios of full occupancy (2a) would result in more direct jobs on site, this is only hypothetical. Once we apply the more realistic vacancy rate for partially empty sites combined with their employment density (2c), the level of direct jobs would be only marginally higher than the Proposed Development. The most realistic comparisons are against counterfactual 1 where the Site is reinstated to residential use, or where the office declines into obsolescence (2b), in which case the employment supported would be very minimal, and clearly the Proposed Development would support considerably more direct employment.

Table 6.3 – Total gross direct operational employment

Scenario	FTEs	Jobs
Counterfactual 1 (reinstatement to residential use)	2	6
Counterfactual 2a (full office occupancy)	52	80
Counterfactual 2b (ongoing office obsolescence and complete vacancy)	2	6
Counterfactual 2c (ongoing obsolescence with realistic expected occupancy and vacancy)	25	39
Proposed Development	21	32

Total gross additional direct operational employment

6.23

The contribution of the Proposed Development less the counterfactual scenarios is shown in **Table 6.4**. This represents the change in employment directly generated versus the reference case in the instance that the Proposed Development was not implemented.

Table 6.4 – Total gross additional direct operational employment

Scenario	FTEs	Jobs
Proposed Development	21	32
Proposed Development less counterfactual 1	19	26
Proposed Development less counterfactual 2 (full office occupancy)	-31	-47
Proposed Development less counterfactual 2 (ongoing office obsolescence and complete vacancy)	19	26
Proposed Development less counterfactual 2 (ongoing obsolescence and reasonable expected vacancy)	-3	-7

Net additional employment

- 6.24 The analysis so far estimates the benefits from the gross direct jobs that would be accommodated by the Proposed Development. To consider the total net additional impact on employment, displacement and multiplier effects must also be considered. The impact is considered at a local authority (Wiltshire) level.
- 6.25 The HCA Additionality Guide provides a framework that allows for the estimation of the net additional impacts of a development.⁹⁸ This method incorporates 'Displacement', 'Multiplier' and 'Leakage' factors into the estimation process as defined below:
- **Displacement:** the proportion of jobs that would otherwise have occurred elsewhere;
 - **Multiplier:** the additional jobs created as a result of supply chain and spending effects; and
 - **Leakage:** the proportion of jobs that benefit those outside of the Proposed Development's study area (Wiltshire).
- 6.26 In estimating displacement, several factors are relevant. The hospitality industry typically has relatively high job mobility because many roles are lower skilled and workers can move between employers more easily. There are also comparable luxury offers in the area which could indicate some displacement as workers shift between venues. However, the Proposed Development will provide a high-quality offer including events and is likely to require additional skills and training to deliver the visitor experience. This may reduce the extent to which roles can be filled through straightforward transfers from nearby businesses. In addition, as a small-scale visitor accommodation and events venue, the Proposed Development may attract new entrants to the local labour market. On balance, a medium displacement assumption (50%) is considered appropriate and conservative.
- 6.27 The composite multiplier reflects additional economic activity supported through the supply chain and through workers' spending in Wiltshire. For visitor accommodation, supply chain expenditure would include food and drink, cleaning supplies, laundry services, maintenance and fit out items. Given the Proposed Development's good accessibility and location near to the Wiltshire border, it is likely that a proportion of the supply chain spend will occur outside Wiltshire. However, the operational model of the Proposed Development emphasises local spend and locally sourced products and experiences per the track record of the Applicant. On this basis, it is reasonable to assume that a relatively higher share of supply chain spend will be retained within Wiltshire compared with a more standard visitor accommodation offer.
- 6.28 Hospitality workers typically earn lower incomes than the average across all sectors of employment. However, given the luxury nature of the Proposed Development, it is likely that average earnings will be higher than is typical for the sector, supporting stronger local spending impacts. Taking these factors together, a conservative 'medium' composite multiplier of 1.5 is considered appropriate to reflect the expected supply chain and income effects within the local economy.
- 6.29 The composite multiplier captures employment supported through supply chain and worker spend, but it does not capture employment supported by visitor spend. These effects are therefore estimated separately (assessed later in the report). Once visitor spend is calculated, induced jobs are estimated by dividing total visitor spend by GVA per worker for the accommodation and food service activities sector. The resulting jobs estimate is then converted to FTEs using the sector's typical part-time working profile.
- 6.30 Finally, employment leakage is proxied by the proportion of workers in Wiltshire that reside inside Wiltshire, calculated using 2021 Census commuting data.⁹⁹ To account for coronavirus-related skew of the data,

⁹⁸ Homes and Communities Agency, 2014. Additionality Guide: Fourth Edition.

⁹⁹ Office for National Statistics, 2021. Census 2021.

individuals recorded as mainly working from home in 2021 are excluded from the analysis. It is calculated that 75% of workers both work and reside in Wiltshire.

6.31

The result of these calculations is shown in **Table 6.5**. **Compared to the most reasonable counterfactual scenarios, the Proposed Development generates the greatest amount of net additional employment, leading to between 46 – 65 net additional FTEs or 56 – 79 net additional jobs.**

Table 6.5 – Compared to the most reasonable counterfactual scenarios, the Proposed Development generates the greatest amount of net additional employment, leading to between 47 – 57 net additional FTEs and 65 – 79 net additional jobs

Total net additional employment

	Counterfactual 1 (reinstatement of residential use)		Counterfactual 2a (full office occupancy)		Counterfactual 2b (ongoing office obsolescence and complete vacancy)		Counterfactual 2c (ongoing obsolescence and reasonable expected vacancy)		Proposed Development (minimum induced)		Proposed Development (maximum induced)	
	FTEs	Job	FTEs	Jobs	FTEs	Jobs	FTEs	Jobs	FTEs	Jobs	FTEs	Jobs
Gross direct employment	2	6	52	80	2	6	25	39	21	32	21	32
Net direct (after 50% displacement)	1	3	26	40	1	3	12	20	11	16	11	16
Net indirect and induced (from worker and supply chain spend)	1	2	13	20	1	2	6	10	5	8	5	8
Net additional employment	2	5	39	60	2	5	18	29	16	24	16	24
Induced from visitors	3	4	3	4	3	4	3	4	30	41	40	55
Total net additional employment	4	9	42	64	4	9	21	33	46	65	56	79
<i>Of which is expected to be taken up by Wiltshire residents (75%)</i>	3	6	32	48	3	6	16	25	34	49	42	59

	Counterfactual 1 (reinstatement of residential use)		Counterfactual 2a (full office occupancy)		Counterfactual 2b (ongoing office obsolescence and complete vacancy)		Counterfactual 2c (ongoing obsolescence and reasonable expected vacancy)		Proposed Development (minimum induced)		Proposed Development (maximum induced)	
	FTEs	Job	FTEs	Jobs	FTEs	Jobs	FTEs	Jobs	FTEs	Jobs	FTEs	Jobs
Total against Proposed Development (minimum induced)	9%	13%	92%	98%	9%	13%	46%	51%	100%	100%		
Total against Proposed Development (maximum induced)	8%	11%	75%	80%	8%	11%	38%	42%			100%	100%

Additional expenditure

Visitor expenditure

- 6.32 In addition to the employment supported on the site, the Proposed Development would drive economic activity through visitor expenditure in the local area. This would comprise spending by visitors who are staying overnight at the Proposed Development on amenities and goods locally, and by those visitors who are not residing at the Proposed Development due to the respective stay type on these expenditure items and additionally accommodation of their own.
- 6.33 According to an Economic Impact Report on Premier Inn hotels, visitors staying in Premier Inn hotels for cultural holidays will spend on average £132.84 per room, per night, outside the hotel, with approximately £106.67 retained in the immediate local area (within two miles) and the remaining spend outside the two-mile radius.¹⁰⁰
- 6.34 The Proposed Development differs materially from an offer such as Premier Inn. As a high-end visitor accommodation, the scheme will operate at a substantially higher price point. To reflect this, the benchmark expenditure figure is adjusted in line with the difference in ADR between Premier Inn and comparable accommodation to the Proposed Development, resulting in an inferred per room spend in the local area of approximately £195 per night, and £45 outside the local area.¹⁰¹
- 6.35 Based on the target occupancy of the Proposed Development and the profile (number and type) of stays, it is possible to derive the amount of spending generated by the staying guests (whose local spend would be expected to be lower) and non-staying guests (whose local spend would be higher and also include accommodation). On this basis the existing site (counterfactual 1) is calculated to generate around £70,000 in local spending per annum. The Proposed Development would generate **between £980,000 – £1.3million in local spending**.

Gross Value Added (GVA)

- 6.36 GVA is the additional value generated by economic activity and is used to estimate the economic activity generated at the Proposed Development. The GVA impact of a development is estimated by multiplying the number of jobs in each sector by the annual GVA per job in that respective sector.¹⁰²
- 6.37 **Table 6.6** sets out the GVA supported by the Proposed Development. Total employment supported directly by the operation of the site is expected to **directly generate GVA of approximately £810,000 per annum**, representing **an uplift of £620,000** compared to how it currently operates.

¹⁰⁰ Turley Economics, 2024. The Economic and Social Impact of Premier Inn Hotels.

¹⁰¹ Note: ADR calculated by taking average standard rate of similar offerings.

¹⁰² The GVA per worker for the 'accommodation and food services' and 'business administration and support services' sectors.

Table 6.6 – GVA generated per annum by the Proposed Development

Job type	GVA per worker in Wiltshire	Current jobs	Current GVA	Proposed Development jobs	Proposed Development GVA	Uplift on existing GVA
Accommodation and food services	£24,000	4	£35,000	27	£655,000	+£619,000
Business administration and support services	£31,000	5	£153,000	5	£153,000	-
Total	-	9	£188,000	32	£808,000	£620,000

Source: ONS, 2023. Gross value added (income approach); ONS, 2023. BRES. Note: figures may not sum due to rounding.

Tax revenues

6.38

By comparing national statistics on GVA in the years 2004 to 2022 with public sector receipts in each year, it can be estimated that tax revenues typically account for between 30% and 40% of GVA.¹⁰³ Applying this to the GVA calculation, it is estimated that the Proposed Development would result in **tax revenues of between £245,000 and £325,000 per annum.**

¹⁰³ ONS, 2024. Regional gross value added (balanced) by industry: all International Territorial Level (ITL) regions; HMRC, 2024. HMRC tax receipts and National Insurance contributions for the UK

7. Social impacts

Introduction

- 7.1 The Proposed Development at Eastleigh Court has the potential to generate a range of social benefits, alongside its economic effects. This section provides a concise overview of local socio-economic conditions and identifies the most relevant issues the scheme could help address through jobs, supply chain opportunities, visitor spend and targeted social value initiatives.

Socio-economic context

- 7.2 The overview indicators suggest that the study area¹⁰⁴ performs broadly in line with, or slightly better than, the South West on labour market outcomes, but with a more constrained working age population and a weaker qualifications profile.
- 7.3 The study area has a lower proportion of working age residents (58.2%) than the South West (60.7%), which is consistent with a relatively older local population and a potentially smaller readily available labour pool. While economic activity is marginally higher than the South West average (58.4% compared to 57.4%), unemployment is very low (1.9% versus 2.1%). This points to a relatively tight labour market locally, where there could be challenges around skills fit and workforce availability.
- 7.4 The study area has a lower proportion of residents qualified to Level 4 and above (29.9%) than the South West (33.1%), alongside a slightly higher share with no qualifications (16.1% compared to 15.7%). This suggests that the Proposed Development's potential social contribution will be strengthened where it creates a mix of employment opportunities, including entry-level and intermediate roles, and where it supports progression through training, apprenticeships and local recruitment.
- 7.5 Finally, the proportion of residents reporting bad or very bad health is broadly comparable to the regional position (4.9% in the study area versus 5.1% in the South West). While this does not indicate a constraint, it highlights the importance of considering how needs may be concentrated in specific communities.

Table 7.1 – Socio-economic indicators show how the Proposed Development's economic and social effects can positively impact the local community

Summary of socio-economic indicators

Indicator	Study area	Wiltshire	South West	England
Working age population (% , aged 16 to 64)	58.2	60.3	60.7	63.0
Economically active (% , aged 16+)	58.4	61.0	57.4	58.6
Unemployed (% , aged 16+)	1.9	2.0	2.1	2.9
Level 4 qualifications or above (% , aged 16+)	29.9	34.2	33.1	33.9

¹⁰⁴ A study area has been defined reflecting the middle super output areas Wiltshire 042, Wiltshire 043, Wiltshire 044, and Wiltshire 047.

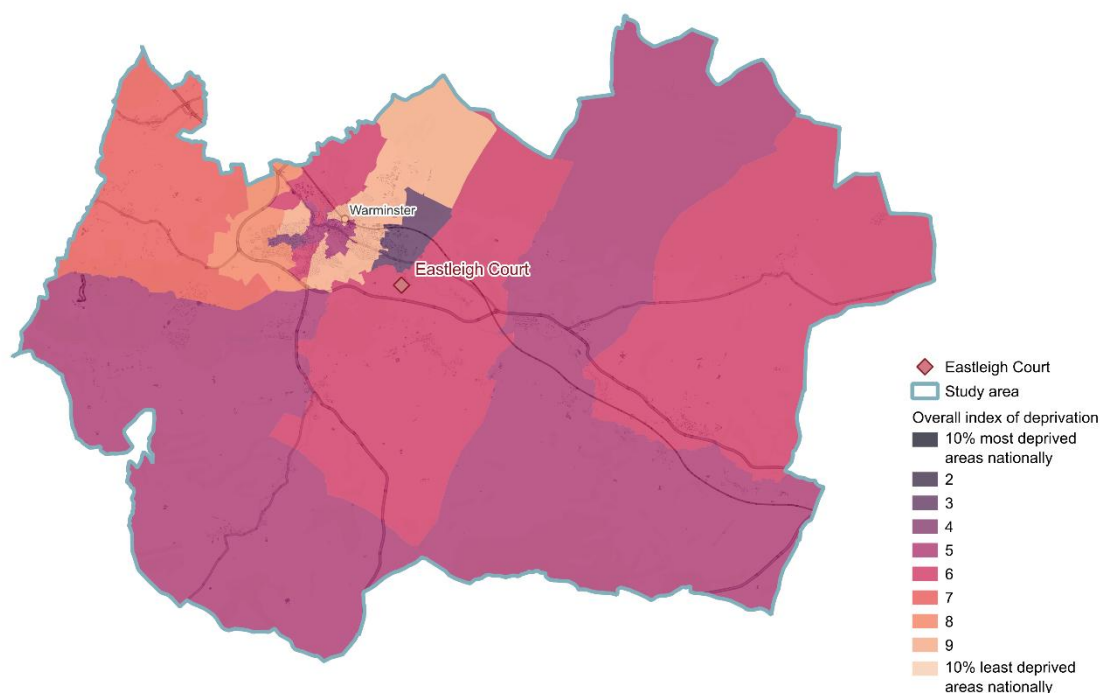
Indicator	Study area	Wiltshire	South West	England
No qualifications (% , aged 16+)	16.1	14.4	15.7	18.1
Bad or very bad self-reported health (% , all residents)	4.9	4.2	5.1	5.2

Source: ONS, 2023. Census 2021: TS066 – Economic activity status. ONS, 2023. Census 2021: TS067 – Highest level of qualification. ONS, 2023. Census 2021: TS037 – General health.

7.6 The map shows that overall deprivation across the study area is generally around the middle of the national distribution, with the most deprived neighbourhoods tending to be in the rural areas (and the area immediately north of the Proposed Development rather than concentrated solely in the main settlement of Warminster. Within Warminster there is also marked variation between LSOAs¹⁰⁵, ranging from relatively more deprived areas to relatively less deprived areas, highlighting a mixed socio-economic profile across the town and its immediate hinterland.

Figure 7.1 – Deprivation is relatively high in the area immediately north of the Proposed Development (Bishopstrow)

Overall index of deprivation in the study area



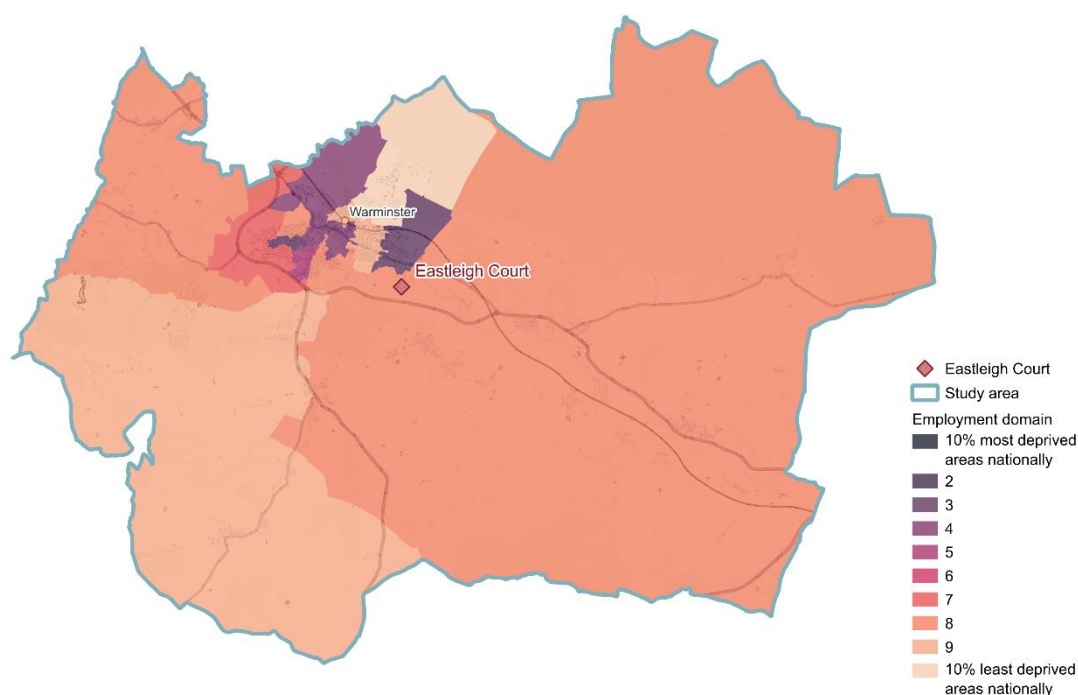
Source: Ministry of Housing, Communities and Local Government, 2025. English indices of deprivation 2025.

¹⁰⁵ Lower super output areas (LSOAs) are small geographies with broadly consistent population sizes used in the reporting of statistics.

- 7.7 The employment deprivation map indicates that, across most of the study area, employment deprivation is very low. The main exceptions are limited pockets within Warminster and Bishopstrow, where employment deprivation is relatively higher. Given the Proposed Development's proximity to Bishopstrow, this creates an opportunity for the scheme to support improved outcomes for the immediate local population through accessible job opportunities, local recruitment routes and targeted skills and progression support.

Figure 7.2 – The Proposed Development presents an opportunity to improve employment outcomes in its immediate vicinity

Employment domain of deprivation in the study area

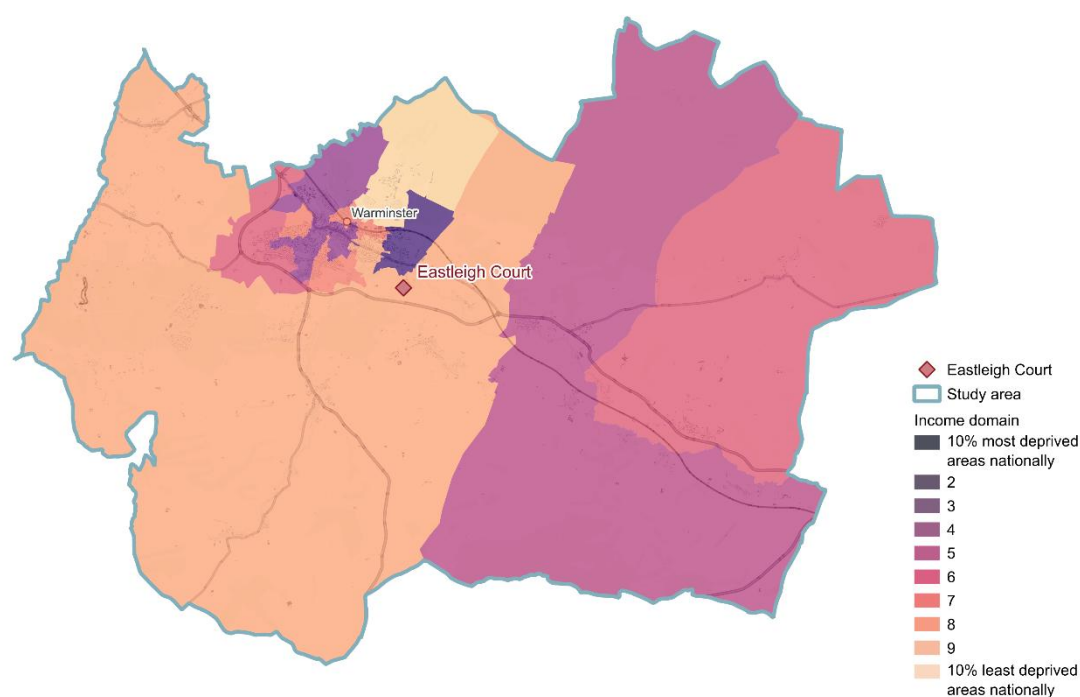


Source: Ministry of Housing, Communities and Local Government, 2025. English indices of deprivation 2025.

- 7.8 The income deprivation map shows a more varied pattern across the study area but consistently identifies Bishopstrow as having the highest levels of income deprivation. In parts of Bishopstrow, income deprivation is among the highest not only within the Study Area but also nationally, indicating that reducing barriers to employment and progression for nearby residents is likely to be a particularly important consideration in how the Proposed Development's benefits are targeted and realised.

Figure 7.3 – Income deprivation is highest in Bishopstrow, including areas among the most deprived nationally

Income domain of deprivation in the study area



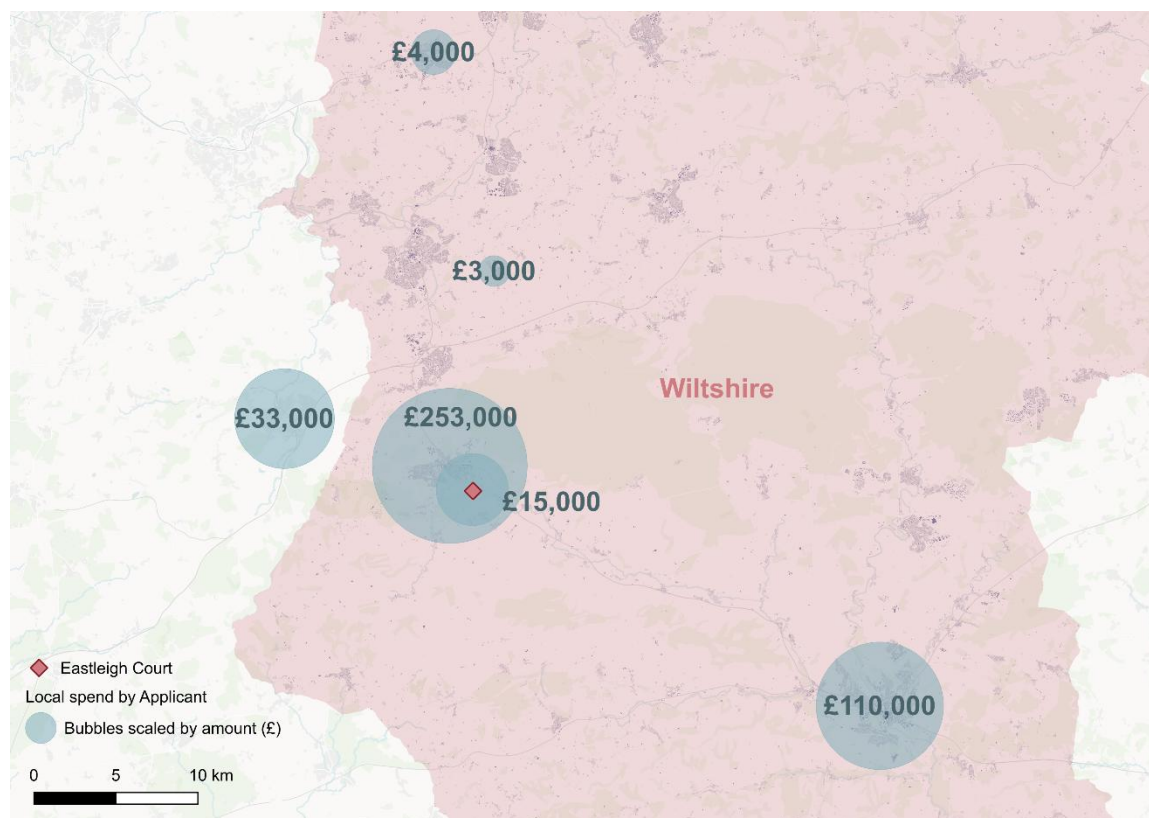
Source: Ministry of Housing, Communities and Local Government, 2025. English indices of deprivation 2025.

Track record of the Applicant

- 7.9 The Applicant's recent expenditure with local suppliers demonstrates an established commitment to supporting the surrounding economy, with clear hotspots of spend in Warminster (around £253,000), Salisbury (around £110,000) and Frome (around £33,000). This spend has benefited a broad mix of local businesses, led by landscaping and grounds maintenance (including a major contract with a Warminster-based landscaper, alongside gardening, hedge cutting and equipment servicing). There is also notable support for low-carbon building services and specialist contractors, including heat pump and solar installation and pool installation and servicing (Salisbury), as well as gates and associated works (including suppliers in Frome and Steeple Ashton). In addition, the Applicant has used local providers for a range of everyday operational services (such as cleaning, laundry, window cleaning, pest management, plumbing and water works and spend in local shops and hospitality) illustrating a pattern of ongoing, considered local procurement.

Figure 7.4 – The Applicant has demonstrated commitment to local spending

Broad locations of local spend by the Applicant



Source: Information provided by the Applicant. Volterra mapping.

Contribution of the Proposed Development

- 7.10 Wiltshire Council's Planning Obligations SPD is supportive of proposals that bring forward community infrastructure and wider community benefits.¹⁰⁶ In this context, the Applicant may wish to consider how the Proposed Development could maximise social value through commitments that: (i) strengthen community access and shared use; and (ii) support local employment, skills, training and enterprise.
- 7.11 The Applicant has already established a clear commitment to supporting local businesses, particularly across Warminster, Salisbury, and Frome, through expenditure on grounds maintenance, specialist contractors, and a wide range of everyday services. Building on this established track record of local procurement and engagement, and as part of the operation of the Proposed Development, the Applicant is proposing to commit to the following measures:
- Supporting nearby schools with educational visits exploring biodiversity, sustainable energy, and heritage;

¹⁰⁶ Wiltshire Council, 2016. Revised Wiltshire Planning Obligations Supplementary Planning Document.

- Collaboration with local heritage, biodiversity, and sustainability groups, with opportunities for collaborative visits and activities;
- At least five Wiltshire-based contractors or specialist trades invited to tender during construction and refurbishment;
- Two free community focused day events and three free-access public open days per year, allowing access to the grounds and Eastleigh Court;
- A minimum of 10 Wiltshire based businesses promoted to maximise local supply chain spending; and
- A local first operating approach that seeks to ensure at least five local service providers are engaged on an ongoing basis to support estate operations.

An aerial photograph of the London skyline, showing the River Thames, the Tower Bridge, and the Gherkin building in the foreground. The image is partially obscured by a white curved shape in the top right corner.

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