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SPOTLIGHT

TOURISM, LEISURE & EVENTS

RURAL – UK – MAY 2026

RESEARCH

KEY STATS

£147BN
GENERATED PER YEAR FROM UK TOURISM[1]

2.4M
JOBS SUPPORTED BY TOURISM IN THE UK[1]

£293M
IS THE ESTIMATED VALUE OF AGRITOURISM IN SCOTLAND[2]

72%
OF FARMS IN ENGLAND HAD DIVERSIFIED ACTIVITY (2024/25)[3]

[1] VisitBritain
[2] Scottish Agritourism
[3] DEFRA

TOP TAKEAWAYS

01

Operators face rising costs and tighter regulation, yet slow recovery and emerging trends offer long-term opportunities.

02

High quality, personalised and memorable experiences increasingly determine demand and support growth within the visitor attraction, accommodation and wedding markets.

03

Rural businesses are naturally equipped to diversify, using unused buildings, distinctive landscapes and environmental assets to meet rising demand for nature-based tourism, activity experiences, holiday accommodation and commercial rentals.

Market performance

Savills *insight*

During 2025, most leisure markets experienced a slow but steady recovery with operators that innovate and respond proactively to tourism and leisure trends well placed for long-term success. This Spotlight reviews the visitor attraction, holiday accommodation and weddings markets, highlighting trends and insights that align with the overarching themes outlined in Savills Spotlight on Tourism, Leisure and Events 2025. Continued interest in authentic experiences, wellness and sustainability is creating areas for growth, particularly for rural operators, where natural landscapes, heritage and slower-paced environments provide an advantage. Growing demand for nature-based experiences, such as wildlife watching, outdoor adventure and conservation-led activities also represent a significant opportunity for rural landowners.

According to the latest Defra Farm Business Survey, 72% of farm businesses across England had some diversified activity in 2024/25. This is a 10% increase since 2014/15. With unused buildings, distinctive landscapes and environmental assets, farms and estates are naturally equipped to diversify into activity experiences, holiday accommodation and commercial rentals.

Scotland will host the Global Agritourism Conference this year and Scottish Agritourism estimates the sector in Scotland to be worth £293 million. The strategy of turning existing farm assets into visitor experiences is delivering significant economic benefits and strengthens rural communities through increased local spending.

Although consumer demand is generally stable across all sectors, many operators are increasingly concerned about the viability of their tourism, leisure and event businesses. Costs are the biggest challenge for operators. Increases in business rates, the national minimum wage and employers' National Insurance (NI) have significantly impacted these businesses, particularly those that rely on large numbers of staff to deliver their service. Furthermore, attracting and retaining good permanent and seasonal staff in the leisure and hospitality sectors is a major challenge. Against this backdrop, new legislation and regulations are also seen as a hindrance, with short-term let licensing and visitor levies either in place or looming for many.

Simon Foster
Savills Tourism, Leisure and Events

Value of UK tourism
A report, "Economic Value of Tourism in the UK", published by VisitBritain in January 2026, indicates that tourism supports 2.4 million jobs and is worth £147 billion annually to the UK, equivalent to 5% of the national economy. The report forecasts the sector's value will reach £161 billion (in 2024 prices) by 2030.

"Tourism plays a vital role in rural areas, driving local business growth, supporting supply chains, and creating jobs. It also helps safeguard local heritage, strengthen communities and improve access to nature.

Sarah Butler, Savills Rural Management

Industry news

Visitor levy introduction across the UK
The UK does not have a national tourist tax. Instead, devolved nations set their own visitor levies on overnight stays.

Scotland: The Visitor Levy (Scotland) Act 2024 gives councils the power to charge an overnight levy. The City of Edinburgh Council voted to introduce a 5% levy from 24 July 2026, capped at five nights. Glasgow City Council will charge 5% from 25 January 2027, and Aberdeen City Council will charge 7% from 1 April 2027. Other councils, including Argyll & Bute and the Highlands, have decided not to charge an overnight levy at this time. The Visitor Levy (Amendment) (Scotland) Bill was introduced in January 2026 to give local authorities further flexibility in designing and implementing the levy, including the ability to impose fixed-amount charges. The Bill is progressing through parliament with the expectation that it will be passed later in 2026.

Wales: Wales passed the Visitor Accommodation (Register and Levy) Bill in 2025. The earliest date on which councils can introduce an overnight levy is 1 April 2027. The Bill includes proposed rates of £1.30 per person per night for hotels and similar stays, and £0.75 per person per night for hostels and campsites. A compulsory registration system for visitor accommodation will also be introduced from autumn 2026.

England: England's consultation to give mayoral authorities the power to introduce discretionary local visitor levies closed on 18 February 2026. While powers are being explored, the tourism industry has voiced strong opposition, with the World Travel and Tourism Council citing concerns about reduced visitor spending and wider economic impacts. However, Manchester and Liverpool already operate overnight visitor levies which are administered voluntarily by hotels, rather than imposed by the government.

Martyn's Law
Martyn's Law (the Terrorism (Protection of Premises) Act 2025), named in memory of Manchester Arena victim Martyn Hett, entered a minimum 24-month implementation period in April 2025. Designed to improve how venues, events and public spaces prepare for and respond to the risk of terrorist attacks, the Act places more demanding requirements on larger events and higher capacity venues. The Act introduces a two-tier system: the Standard Tier (200-799 people) and the Enhanced Tier (800+ people). The Security Industry Authority has been appointed as the regulator working towards the Act being fully operational in spring 2027.

Non-domestic rates for Scotland's self-catering sector
Recent updates to Scotland's non-domestic rates (NDR) system have tightened the evidence required for self-catering properties. To remain on the valuation roll, properties must show they were available for 140 nights and let for 70, or they will revert to the Council Tax regime. Following steep increases in rateable values in 2026, the Scottish Government introduced a sector specific Revaluation Transitional Relief, capping NDR increases at 15% per year until 2029. A time-limited window allows operators to submit missing evidence for 2024/25, and, from April 2026, evidence for any financial year.

Short-term let licences in Scotland
Short-term let licences remain mandatory in Scotland for any operator offering short-stay accommodation. A licence is required before taking bookings, and properties must meet mandatory safety standards, including fire, gas and electrical compliance and hold public liability insurance. Operating without a licence can result in fines of up to £2,500 and a one-year ban. Amendments introduced in 2024 allow licences to be transferred to a new owner upon sale, enable developers to apply for provisional licences during construction, and increase flexibility around temporary exemptions.

Short-term let planning permission in England
England is moving towards a more regulated system for short-term and holiday lets based on three main pillars:

01 **A proposed new C5 planning use class for short-term and holiday lets, to bring clarity to when a change of use requires planning permission. At the time of writing, there is no confirmed implementation date.**

02 **A compulsory national registration system, expected to go live in 2026, requiring all short-term and holiday lets to register and display a unique registration number.**

03 **Stronger local council powers to regulate short-term and holiday lets, particularly in areas experiencing high tourism or housing pressure. This includes planning enforcement and the ability to require planning permission in defined locations where this is considered necessary to protect local communities and housing supply.**

Energy Performance Certificates (EPC) for short-term rentals
Reforms to EPCs will affect England, Wales and Scotland in different ways. England and Wales will move away from the current single A to G EPC rating and towards a new system with multiple metrics. Implementation has been delayed, and the existing EPC system will remain in place until at least the second half of 2027, rather than October 2026. Until the UK-wide timetable is confirmed, similar reforms to EPC methodology have also been delayed in Scotland, with the current EPC framework continuing to apply.

Nature and wildlife tourism are fast growing areas, driven by sustainability, wellbeing and experience, as well as niche trends such as hushpitality and noc-tourism. Grand View Research reports the UK wildlife tourism market generated approximately £4.1 billion in 2025 and is forecast to reach £7.4 billion by 2033.

TRENDS AND INSIGHTS TO WATCH	INSIGHT	OPPORTUNITY
Hushpitality	Rising demand for silence, calm, privacy and restorative environments. Hilton's 2026 report shows 56% of travellers prioritise rest and recharge.	Quiet luxury stays, silent retreats, forest bathing, low light paths.
Noc-tourism	The Great British Holiday Audit 2026 highlights "dark sky tourism" as one of the most distinctive trends of the year.	Stargazing pods, astronomy lodges, nocturnal safaris, moonlit yoga, night tours.
Celebreaktions and multigenerational travel	Celebration-led and multigenerational trips are increasing. 47% of families took a three generation trip last year (PartyHouses).	Celebration venues, large houses, multi-unit stays, private dining packages.
Salvaged stays	Interest is rising in sustainable, heritage-led accommodation that offers guests a sense of story and place.	Restored industrial, agricultural or historic buildings, story-led design and marketing.
Set-jetting	Travellers visiting film and TV locations remains strong. Visit Scotland identifies set-jetting as an enduring trend for 2026.	Film location guided walks, behind-the-scenes storytelling.

Savills *insight*

The UK holiday accommodation sector remains resilient, despite operational pressures, regulatory changes and shifting consumer behaviours. Demand remains broadly stable, but guests are becoming more selective. Later bookings, shorter stays, and a strong emphasis on quality now characterise the market.

Despite the macroeconomic backdrop, consumer expectations continue to rise. Guests are increasingly shortening their stays rather than compromising on standards. This aligns with broader sector commentary showing that quality has become a clearer driver of decision-making, helping high-standard operators maintain occupancy.

Regulation is becoming more significant, with changes to rules on non-domestic rates, short-term let licensing, and potential levies in certain regions.

Demand segmentation highlights several strong-performing groups. DINKYs (dual-income, no kids yet) remain a key driver of year-round short breaks, favouring high-amenity accommodation and curated, experience-led stays. Couples are seeking more personalised experiences; operators who can deliver personalised packages (wellness elements, dining experiences, stargazing, immersive activities) are capturing valuable midweek and off-peak demand.

Simultaneously, the multigenerational travel trend continues to grow. Families increasingly seek space, privacy and onsite experiences that cater to all ages, making well-located group accommodation a consistent outperformer. Another defining theme is dog inclusivity.

Looking ahead, operators that combine high-quality accommodation with memorable, experience-led offers, while staying agile amid regulatory and cost pressures, will be well positioned to succeed in 2026 and beyond.

Adam Davies
Savills Tourism,
Leisure and Events

High standards, high expectations for UK stays

Industry insight

2025 was a positive year for the high-quality UK holiday home market, with continued demand for short breaks and particularly resilient performance from dog-friendly properties, design-led couples' retreats and larger homes suited to multigenerational stays.

This year, we expect these themes to remain, as guests increasingly prioritise space, wellbeing and time together, while staying value conscious. The key challenge for operators is balancing premium positioning with "bookability" – excellent onsite facilities, high-quality interiors, flexible stay lengths, an exceptional guest experience and well-considered house rules – as even small barriers can disproportionately impact conversion in competitive local markets.

Emerging trends include a growing expectation for genuine pet inclusivity, wellness-led features and a continued shift towards experience-led travel in less crowded, more authentic destinations.

Emma Crabtree
Founder,
Crabtree & Crabtree

2025 IN NUMBERS

4%

Short-term rental supply rose by 4% in December 2025 compared to December 2024, reaching 441,193 properties. The average length of stay fell to 7.4 nights in December 2025, down from 7.8 a year earlier.[5]

27M

VisitBritain reported that British residents took fewer overnight trips in 2025, with 27 million in England, down 2% on 2024. Despite this decline, the total spend increased by 11% due to higher spending per trip.[5]

42%

During 2025, 42% of bookings were made up of couples, followed by adult groups at 28%, reinforcing strong demand beyond traditional family travel.[4]

England

- The North East, East Midlands and West Midlands have the fewest short-term rental properties available and, subsequently, the lowest number of nights reserved.[5]
- The spread of nights reserved across the UK follows a similar trend to that of supply, with the most nights being reserved in London, the South West and the South East in December 2025.[5]

Scotland

- Average occupancy for self-catering properties in Scotland fell slightly from 41.6% in 2024 to 41% in 2025; however, this remains the highest rate across the UK. Scotland saw notable growth (7%) in supply in December 2025 compared to the same month in 2024.[5]
- The average duration of trips in Scotland during the third quarter of 2025 was 3.1 nights, with an average spend per night of £124 and average spend per trip of £384.[6]

Wales

- Wales has experienced the steepest decline in its occupancy rate since 2019 (-8%), and recorded the lowest occupancy rate across the UK in December 2025 (37%).[5]

[4] Sykes December 2025 Holiday Letting Pulse Report, [5] VisitBritain UK short-term rentals,
[6] VisitScotland – Domestic Overnight Tourism report

Farm diversification at a world heritage site

Longstones Avebury

Creating both a legacy and an additional income stream were the motivations behind a successful farm diversification project within the Avebury World Heritage Site in Wiltshire. Manor Farm in Avebury Trusloe is owned by the Butler family, who have farmed the land for four generations, dating back to the 1930s.

With the Basic Payment Scheme (land-based farm income support) being phased out, the family wanted to find a solution to ensure the long-term financial security of the farm business, while protecting the character of the village and its sensitive surroundings. In 2019, the family sought advice from Savills, drawing on the expertise of specialists within the food and farming, architecture and building surveying, planning and tourism teams.

The option that stood out as ensuring long-term viability, while complementing the location, was a holiday accommodation business using the existing redundant farmyard site.

The site falls within the Avebury World Heritage Site, so the appearance and landscaping of the new buildings were a particular consideration. Four of the units are newly built and two are converted from existing buildings. Another consideration was to make the buildings as sustainable as possible, with features such as triple-glazed windows, high levels of insulation, and air-source heat pumps.

The whole project took five years to complete, from conception through construction, landscaping, interior design to marketing of the new business, "Longstones Avebury". The business is performing well and receiving excellent reviews from guests.

Ben Butler, who has been immersed in the project throughout, says, "We are incredibly excited to have been able to breathe new life into what was a disused farmyard. For us, it was important to create a legacy."

A destination evolving through strategic investment

Yorkshire Wildlife Park Resort

Yorkshire Wildlife Park Resort (YWPR), located in Doncaster, South Yorkshire, has rapidly established itself as one of the UK's leading wildlife destination resorts. Since opening in 2009, the resort has grown significantly both in scale and reputation, now welcoming approximately 850,000 visitors per year. As a conservation-driven attraction, home to 100s of animals across diverse species, its ongoing expansion continues to enhance its visitor proposition while supporting important ecological and educational aims.

Strategic expansion and long-term growth

YWPR's development has been defined by strategic land acquisition and substantial reinvestment. A major step change occurred in 2018, when the resort acquired an additional 150 acres, enabling a transformational expansion of its wildlife reserves and guest facilities. Now spanning 440 acres, the resort has been able to introduce new habitats, enhance its amenities and broaden its on-site leisure offer.

A significant milestone has been the transition from a day visitor attraction to a fully-fledged short break destination. The addition of new on-site accommodation, in the form of the Hex Wildlife Hotel, offers high-quality stays for families, leisure guests and corporate visitors.

Complementing this, the resort now features 15 retail units, restaurants, coffee shops, a conference centre and a vibrant programme of entertainment and events, which significantly extend the dwell time and diversifies revenue streams. The retail village forms part of the wider master-planned visitor hub, designed to support an all-weather, year-round offer.

Events investment: Expanding a key growth market

YWPR's events programme has become central to its visitor engagement strategy, including seasonal festivals, concerts, theatrical shows and family-friendly experiences. This represents the next development opportunity at the resort, the Hex Events Venue, a multi-purpose events venue with capacity for up to 2,500 people. YWPR is seeking an investment partner for the new events venue. The proposed venue will further strengthen the resort's ability to attract new audiences, support the regional economy and extend its trading season.

CEO John Minion explained the opportunity, "The Hex Events Venue has exceptional potential within the region. We had identified the gap in the market for mid-size events up to 2,500 people in the Doncaster area. This was later supported by the product audit in the South Yorkshire Destination Management Plan. It is a great opportunity for an experienced operator, both for its market potential and the infrastructure and supporting businesses surrounding the Hex Events Venue in the Yorkshire Hive, especially the Hex Wildlife Hotel. YWPR has already invested significantly in the steel structure for the building but needs an investment partner to realise the vision."

> "YWPR is a standout example of a leading visitor attraction that continues to invest boldly and adapt to changing market conditions. Its evolution reflects the wider sector trend toward creating multiday, experience-rich environments. This strategic approach not only enhances visitor appeal but also demonstrates how forward-thinking operators can diversify revenues and remain resilient in a competitive marketplace.
>
> **Adam Davies, Savills Tourism, Leisure and Events**

> Farms and visitor or heritage centres recorded the strongest year-on-year growth, with visits up 11% and 6% respectively.[7]

Savills *insight*

Outdoor experiences on the rise

Despite challenging economic conditions and significant increases in employment costs, visitor numbers grew modestly across most UK attractions, particularly in the rural sector, compared with 2024. Interestingly, farms and visitor or heritage centres saw the largest year-on-year increase in visits (VisitBritain). Visitors are increasingly drawn to nature-based experiences, such as walking or wildlife trails, which help people reconnect with nature and gain physical and mental health benefits.

We are also seeing continued growth in visitor numbers to outdoor play attractions, with many great examples in the grounds and estates of historic houses and palaces. These diversifications help attract a wider, more diverse audience to attractions.

Events are an important way to increase visitor footfall and encourage repeat visits. These are often outside the traditional peak season, with Christmas light trails and Halloween events often attracting more visitors than summer bank holiday weekends.

Simon Foster
Savills Tourism,
Leisure and Events

Industry insight

"2025 was, as predicted, a tough year for visitor attractions as they dealt with the significant increase in employment costs from the 2024 Budget - namely changes to employers' NI contributions (an increase in the percentage rate and a lowering of the threshold) and national minimum wage increases. Additionally, the ongoing cost-of-living crisis led consumers to spend cautiously. Despite this, the year ended on a high, with a 10% increase in visitor numbers across Association of Leading Visitor Attractions (ALVA) members in December, compared with December 2024. Showing memorable family experiences, such as winter lights, Christmas markets, and dressing stately homes and heritage properties for Christmas, were highly popular and valued, even when sold at premium prices.

Consumer confidence will slowly build this year and we are seeing a trend of visitor attractions taking more commercial risks in monetising their assets. Creating premium experiences, partnering with a different and broader range of commercial partners and taking the consequences of the very hot June of last year seriously (which saw attraction numbers fall by 9% compared to June 2024). Diversifying income streams, sweating assets and planning for shade will be hallmarks of 2026."

Bernard Donoghue OBE
Director,
Association of Leading Visitor Attractions

2025 IN NUMBERS

ACROSS THE UK

2.2%

Admissions among ALVA members in the UK increased by 2.2% during 2025. This compares to 3.4% in 2024.[8]

5.0%

Scotland recorded a 5% increase in visits to attractions in December 2025 compared with December 2024, contributing to a 1.2% increase in visits across 2025.[10]

18.0%

In January 2026, 18% of UK adults reported that the cost of visitor attractions was a barrier to taking UK holidays and short breaks in the next six months, with 10% suggesting they would visit fewer visitor attractions as a result. This is unchanged from January 2025.[9]

PERFORMANCE BY ATTRACTION TYPE

3.0%

In Scotland, several attraction categories showed year-on-year growth in 2025, including historic houses and palaces (3%), wildlife/animal attractions (5.9%), and nature attractions (8.8%).[10]

2.6%

ALVA data indicates that attractions combining both indoor and outdoor elements saw the strongest growth among attraction types, with a 2.6% increase in visitor numbers.[8]

14.0%

Historic Houses members welcomed over 21.3 million visitors in 2025, an increase of 14% on 2024.[11]

> Events are an important way of increasing visitor footfall and encouraging repeat visits.

[7] VisitBritain England Visitor Attractions, [8] ALVA state of the nation, [9] Domestic Sentiment Tracker: January 2026,
[10] ASVA Monthly visitor attraction report December 2025, [11] Historic Houses,

Savills *insight*

After several years of strong demand driven by post-pandemic catch-up, the UK wedding venue sector experienced a natural slowdown in 2025. This likely reflects the final ripple effects of Covid-19, with fewer relationships forming in 2020/21 resulting in fewer weddings four years later. According to the Office of National Statistics, many weddings cancelled during the 2020/21 lockdowns were never rearranged.

Looking ahead, the outlook is more positive with bookings for 2026 and 2027 already tracking ahead of last year, signalling renewed confidence.

Budget sensitivity remains a key market feature, contributing to growth in midweek weddings, off-peak and smaller guest numbers.

Demand for destination-style wedding venues continues to rise, with two-day or weekend-long celebrations becoming more popular. Couples are moving away from rigid, package-led formats and instead seeking celebrations that feel highly personalised, authentic and reflective of their story. Properties such as Errol Park in Perthshire and Pylewell Park in Hampshire are good examples of locations that cater to this growing appetite for extended, immersive experiences.

Food and beverage trends mirror this shift, with informal options, particularly food trucks, gaining popularity for their atmosphere, choice and cost control. Venues must ensure that external caterers meet the required standards in licensing, insurance, experience, and staffing, including adequate staffing to serve and clear tables.

With cost pressures persisting, robust financial forecasting is crucial so that weddings sold today are priced accurately for delivery in future years.

Regulatory change is also emerging, with proposed reforms in England and Wales that aim to allow greater flexibility over ceremony locations by shifting regulation from the venue to the officiant. Scotland is also considering raising the minimum age for marriage from 16 to 18.

Despite cost pressures and evolving consumer preferences, well-located and well-managed venues continue to offer strong commercial potential.

Adam Davies
Savills Tourism,
Leisure and Events

Renewed momentum following post-pandemic

> Looking ahead, the outlook is more positive with bookings for 2026 and 2027 already tracking ahead of last year, signalling renewed confidence.

Industry insight

"2025 was quieter than previous years, but bookings for 2026 and 2027 are back up. The most popular venues are architecturally beautiful and easy to decorate, and more brides and grooms are looking for a dedicated space to get ready.

We are also receiving a steady flow of enquiries from landowners who want us to assess their barns, as well as more conversations about taking on the day-to-day running of existing wedding venues. The biggest obstacle is not demand, it is government policy: turnover-based business rates, extortionate electricity standing charges, and the employers' NI increase are all adding to bills, which is the opposite of what rural businesses need."

Ed Coke-Steel
Development Director,
Cripps & Co

2025 IN NUMBERS

34.8

IS THE AVERAGE AGE OF THE WEDDING COUPLE.[12]

74

IS THE AVERAGE NUMBER OF GUESTS ATTENDING THE CEREMONY.[13]

71%

OF COUPLES HAD THEIR CEREMONY AND RECEPTION IN THE SAME PLACE.[13]

-11%

FEWER GUESTS INVITED TO THE MAIN WEDDING RECEPTION THAN IN 2024.[13]

22%

OF WEDDINGS TOOK PLACE IN BARN VENUES.[12]

[12] Hitched, [13] Bridebook 2026 report

Communication

- 82% of couples use social media to research venues.[13]
- Venues must ensure a strong online and social media presence, as over 66% of couples say they value decent imagery of spaces and real weddings.[13]
- The first contact with couples remains crucial, with 4 in 5 couples booking within a month.[13]

Product

- Price, package inclusions, and on-site accommodation remain key differentiators for couples when selecting a venue.
- 83% of couples make at least one sustainable choice in their wedding planning, such as using biodegradable confetti, paperless invitations and upcycled décor.[13]
- 31% of couples said that an outside space set their chosen wedding venue apart from others.[13]

Pricing

- The average total cost of weddings continues to rise, with Bridebook reporting an average spend of £20,604 and Hitched reporting £21,990, reflecting a 5% increase compared to last year. Despite rising costs, 25% of couples still spend over £26,000 on their wedding.[12/13]
- The cost per guest has risen to £272, despite guest numbers falling.[12]
- Transparency matters: 72% of couples will not contact a venue unless clear pricing is available online.[13]

Seasonality

- While the traditional "summer Saturday" remains popular, couples are increasingly flexible. According to Bridebook, 47% of weddings take place on a Saturday, 27% Monday to Thursday, and 17% on Fridays.[13]
- Couples are less likely to compromise on seasonality, reflecting strong demand for premium dates. In 2025, 40% of bookings fell in high peak periods (May – August), up from 33% in 2024.[13]
- August remains the most popular month (17%), followed by May (13%) and September (12%), with 15 September the most popular wedding date in 2025.[13]

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RURAL RESEARCH

Nicola Buckingham
Associate Director
+44 (0) 7807 999 011
nbuckingham@savills.com

Jordan Rimmer
Senior Staff
+44 (0) 7870 999 441
jordan.rimmer@savills.com

TOURISM, LEISURE AND EVENTS

Simon Foster
Director
+44 (0) 7855 999 486
sfoster@savills.com

Adam Davies
Director
+44 (0) 7929 854 314
adam.davies@savills.com

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