



ACCOMMODATION AUDIT & MARKET REVIEW

South Downs
National Park

August 2025




South Downs
National Park Authority

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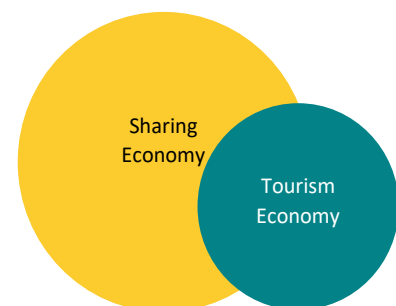
Notes:

1. Data Sources: The data underpinning this review has been gathered from a range of sources and where secondary those sources are given. The asset audit was derived from information from various websites and this may reflect operating businesses to a greater extent.
2. This document is best viewed on a high resolution 27" monitor. When printed the document is A3 in size and is printed on Cocoon recycled paper. The polypropylene front cover is recyclable. 

Introduction

1. This document presents a map of the visitor accommodation sector within the South Downs National Park. It has been commissioned by the South Downs National Park Authority to inform both the South Downs Partnership Management Plan and South Downs Local Plan Review.
2. The study area is the South Downs National Park which covers over 1,600 square kilometers of lowland landscape between Beachy Head (near Eastbourne in the east) and St. Catherine’s Hill (near Winchester in the west) over the counties of East Sussex, West Sussex, and Hampshire. In terms of all UK National Parks, the South Downs National Park has the largest population (circa 118,000 people), second largest number of visitors (circa 19 million annually), and third largest area (circa 1600 km²). Its linear geography makes it more challenging to successfully manage and develop the visitor economy, when compared with most other protected landscapes.
3. The South Downs has adopted a regenerative tourism strategy that is designed to support visitors while also promoting biodiversity, encourage climate action and enhancing the landscape.
4. This report provides a detailed view of the accommodation base, identifying and mapping the differing categories of visitor accommodation shown in the table below. For the purpose of this analysis this is subdivided into two different economies, the tourism economy and the sharing economy.
 - The Tourism Economy reflects the professional sector, usually run by businesses that usually have a website, often employ staff and may pay VAT.
 - The Sharing Economy reflects the emergence of less formal operations that are usually promoted through one or more channels such as Airbnb and are often not businesses, being operated by property and homeowners, usually on a non-serviced basis.
 - The pie chart below gives a view of the typical relative sizes of these economies by numbers of establishments. When measured by number of rooms however, the tourism economy usually provides the majority of rooms, reflecting the larger scale nature many professional operations.
5. We hope this document helps inform and shape the future of tourism in the South Downs National Park. A Survey and a series of Interviews has also supported this project and the findings should be read in conjunction with this document.

Relative Size of the Non-Serviced Accommodation sector – by establishment



Tourism Economy & Sharing Economy
Relative size in terms of total number of self-catering units in three English counties

Typology of Typical Accommodation Supply	
Tourism Economy	Hotel
<i>Serviced</i>	B&B / Guest House
	Branded Budget Hotel
	Pub / Inn
	Residential Accommodation
Tourism Economy	Self Catering Apartment
<i>Non-Serviced</i>	Self Catering House / Cottage
	Camping / Caravan / Glamping Site
	Holiday Park / Lodge
	Hostel / Bunkhouse
	Other non-serviced
Sharing Economy	Airbnb / vrbo

Tomorrow's Tourism 2024

1. Accommodation Stock

1.1 The Tourism Economy - Accommodation Stock

- There are 313 accommodation establishments operating in the tourism economy in the South Downs National Park, run by 206 businesses.¹ (The tourism economy is defined as establishments that are professionally run, usually have a website, may employ people and usually pay VAT).² See Figures 1, 2 and overleaf. Approximately 3,500 rooms (including camping pitches) and 10,910 bed spaces are available.
- Page 4 shows the distribution of these properties across the National Park and gives a further table of the detail.
- 36% of the offer is serviced with 64% non-serviced. Rooms offered by serviced establishments exceed those of non-serviced properties with the area's 23 hotels averaging 34 rooms, 42 inns averaging 7 and the 47 B&Bs averaging 3.
- Serviced accommodation has declined by almost two thirds from 305 properties to 112 since the 2014 audit.¹ Sub-categories that have particularly declined, include B&Bs and Guest Houses (-79%) which reflects the national trend.
- This 'reduction' however is the result of a switch in category with previous B&B and Guest House owners turning to newer distribution channels, like Airbnb, which provides a greater incentive to run on a self-catering basis.² Nationally, there has been a 28% increase in the number of short-term rental properties available since 2019.³
- Self-catering has remained broadly similar over the last 5 years for those operating in the professional sector. A stock of 109 self-catering properties has increased to 121.
- The area has a large number of camping⁴ and caravan sites with 22% of the stock being this category and this has seen significant growth since the 2014 audit. Sites are relatively small compared to many other parts of the UK, providing an average of 25 pitches per site.
- There are 42 pubs/inns across the National Park, a decrease of 14% on the 2014 audit which found 49. Of those not in the 2025 audit:
 - 2 properties have closed
 - 2 are now pubs only
 - Another has diversified to offer 2 self-catering units alongside its inn accommodation.
 - 1 has been turned into boutique apartments and commercial units
 - 1 was outside the SDNP boundary

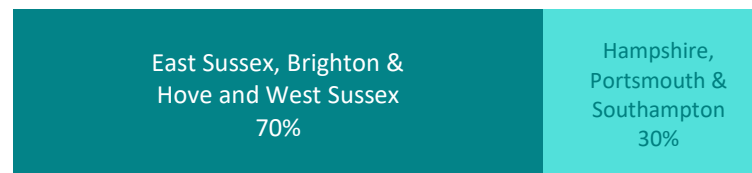
Figure 1
Hotel supply in the Market Towns

Market Towns	Hotels	Of which Branded Budget Hotels
Petersfield	2	1
Lewes	1	0
Midhurst	3	0
Petworth	1	0

Figure 2
Change in Tourism Economy Stock from the 2014 Audit

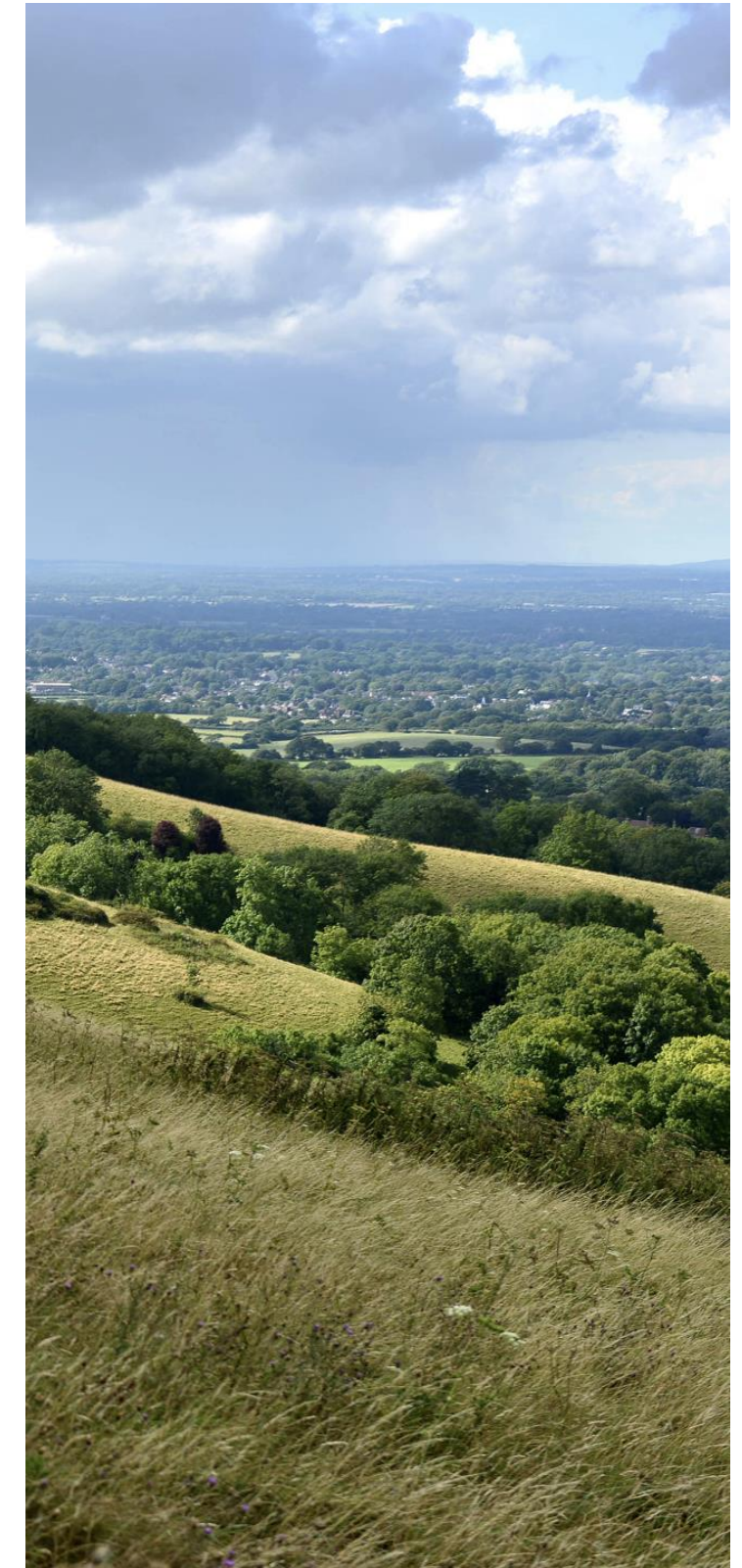
Sub Category	2014	2025	Change
Hotels	31	23	-26%
B&Bs / Guest Houses	225	47	-79%
Pubs / Inns	49	42	-14%
Self-catering	109	121	11%
Camping / Caravanning / Glamping	33	68	106%
Holiday Parks / Lodges		1	
Group / Hostels	5	11	120%
Grand Total	452	313	-31%

Figure 3
Distribution by LVEP (within NP Boundary)



Notes:

- The 2025 audit can be considered to include >90% of all accommodation in the study area.
- Properties sold through Airbnb have been removed from the Tourism Economy masterlist to avoid duplication as these are reported in the later Section. Significant numbers of Airbnb properties may be sold through other channels. Some Tourism Economy businesses may also use Airbnb as a sales channel but if so, it will not be the principal sales channel.
- Source: VisitBritain <https://www.visitbritain.org/research-insights/uk-short-term-rentals>
- All types of camping is considered as non-serviced but the category is shown separately in the table overleaf due to volumes. Where no information on size of camping pitches is given, it is estimated that each pitch will accommodate four people.



1.1.1 The Tourism Economy - Accommodation Stock - Distribution

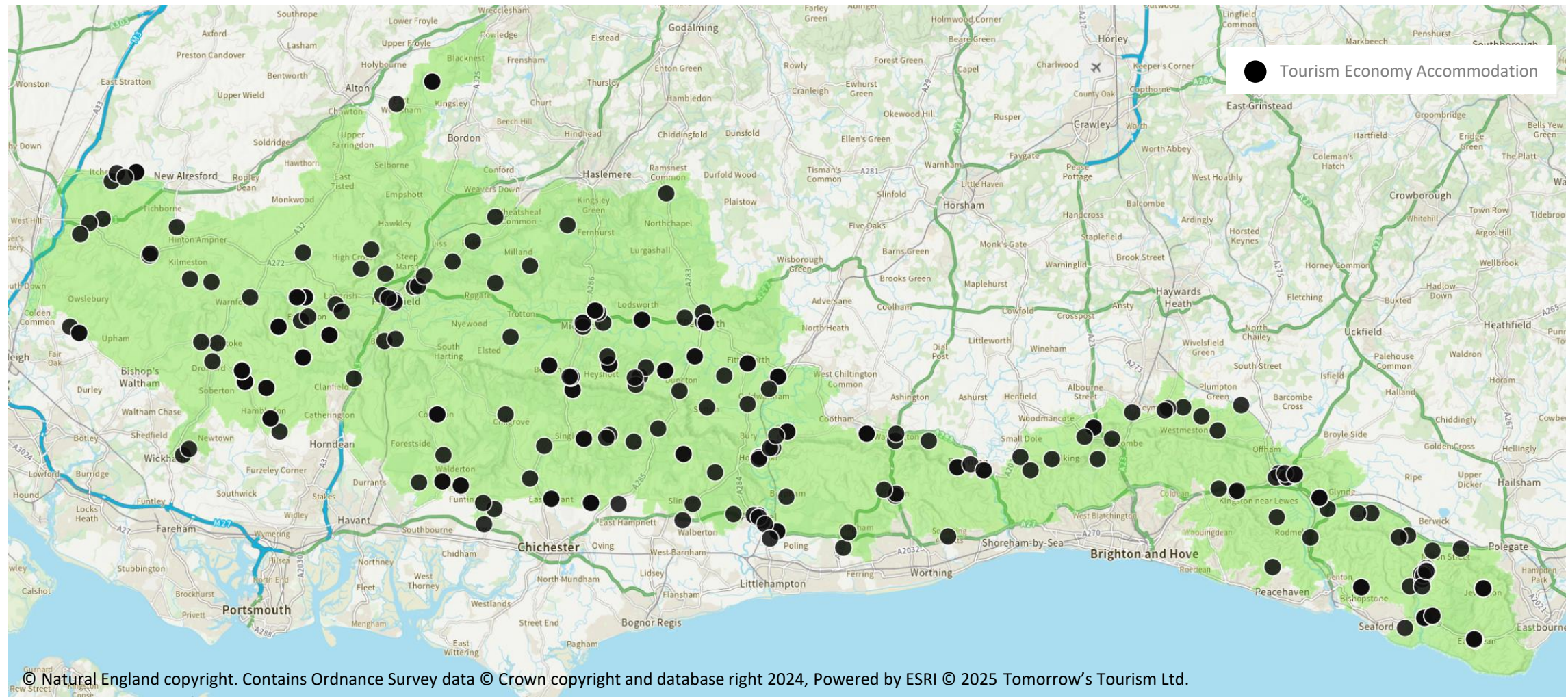
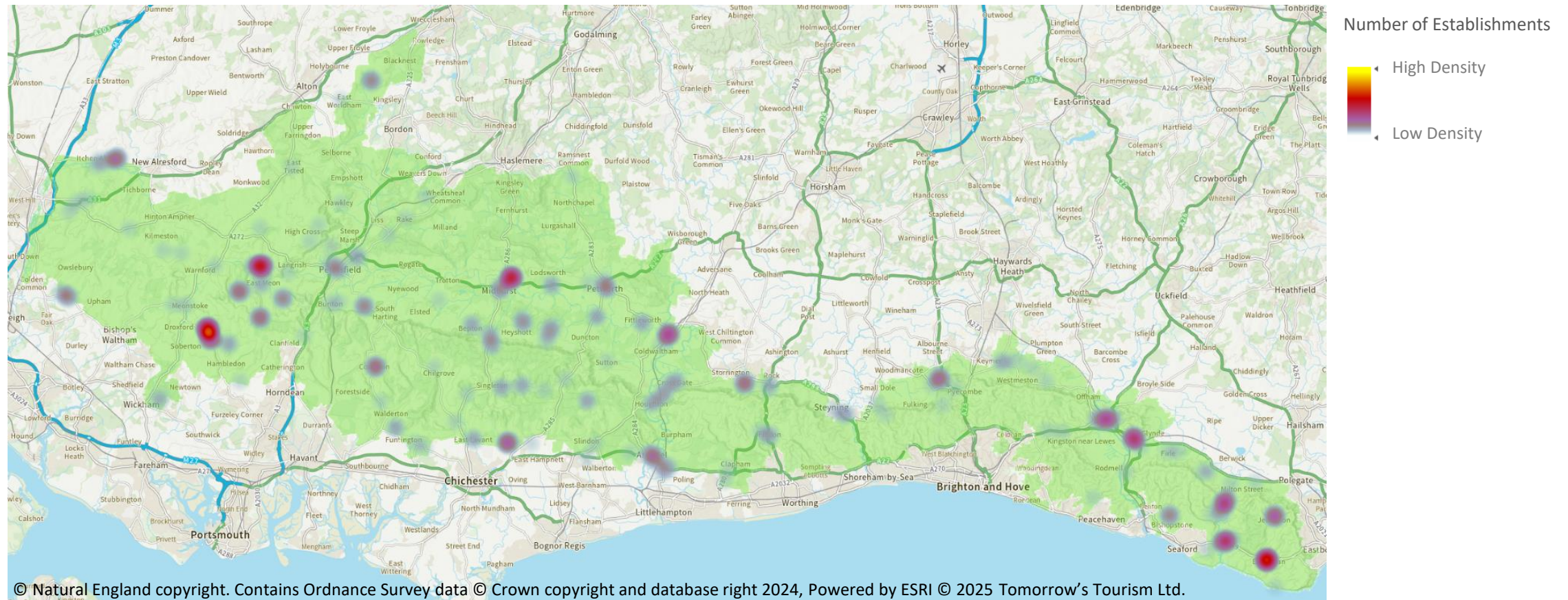


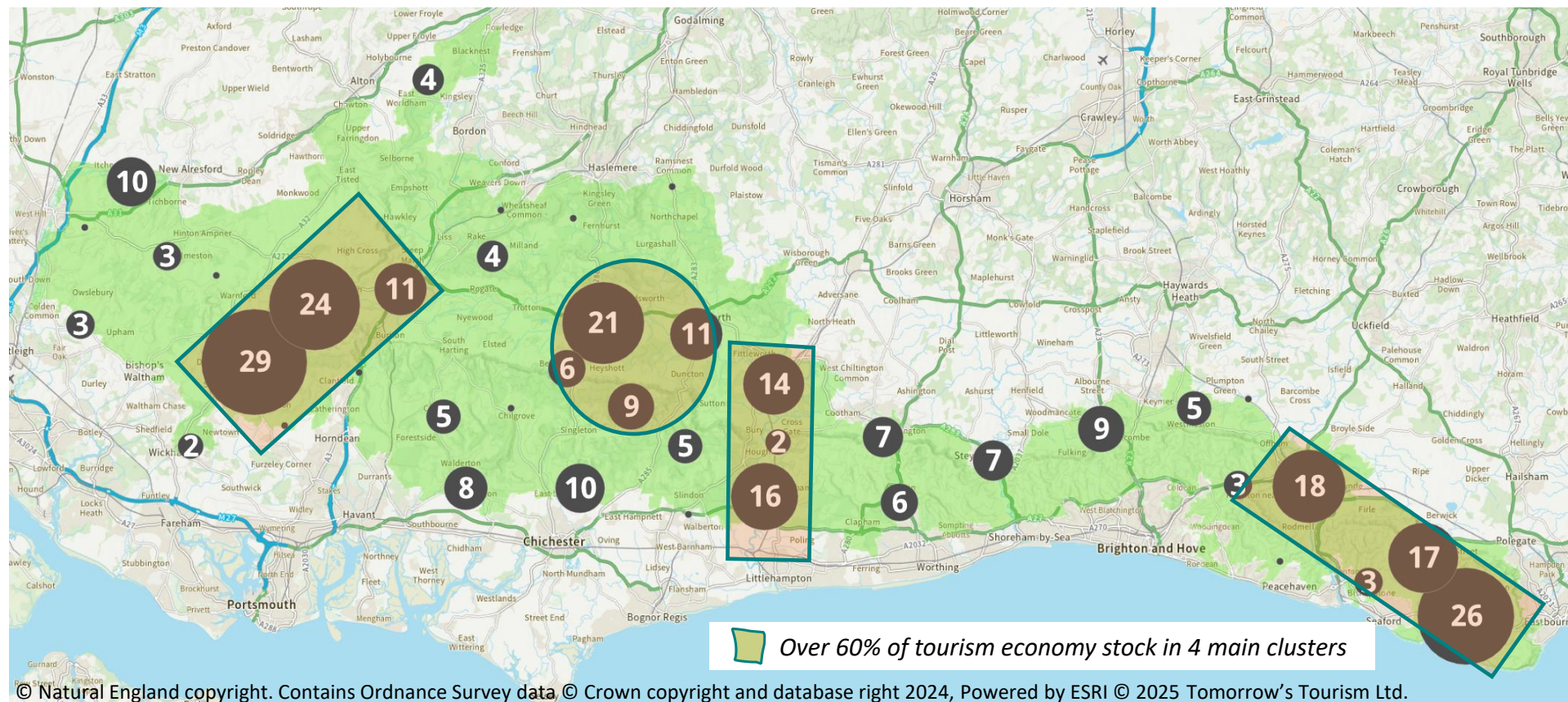
Figure 4 SDNP Tourism Economy Accommodation Stock 2025

Sub-Category	Est.	%	Served				Non Served				Camping / Caravan		Glamping			
			Rooms	%	Beds	%	Units	%	Rooms	%	Beds	%	Pitches	Beds	Units	Beds
Hotel	20	6%	680	55%	1,406	54%										
Hotel - Branded Budget	3	1.0%	130	10%	322	12%										
B&B / Guest House	47	15%	149	12%	308	12%										
Pub / Inn	42	13%	286	23%	582	22%										
Self Catering Apartment	1	0.3%					1	1%	3	0.7%	6	0.7%				
Self Catering House / Cottage	120	38%					142	92%	359	88.9%	752	84.2%				
Holiday Park / Lodge	1	0.3%					8	5%	16	4.0%	32	3.6%				
Group & Youth	11	3.5%					4	3%	26	6.4%	103	11.5%				
Camping / Caravan / Glamping	68	22%											1,701	6,853	150	546
	313		1,245		2,618		155		404		893		1,701	6,853	150	546

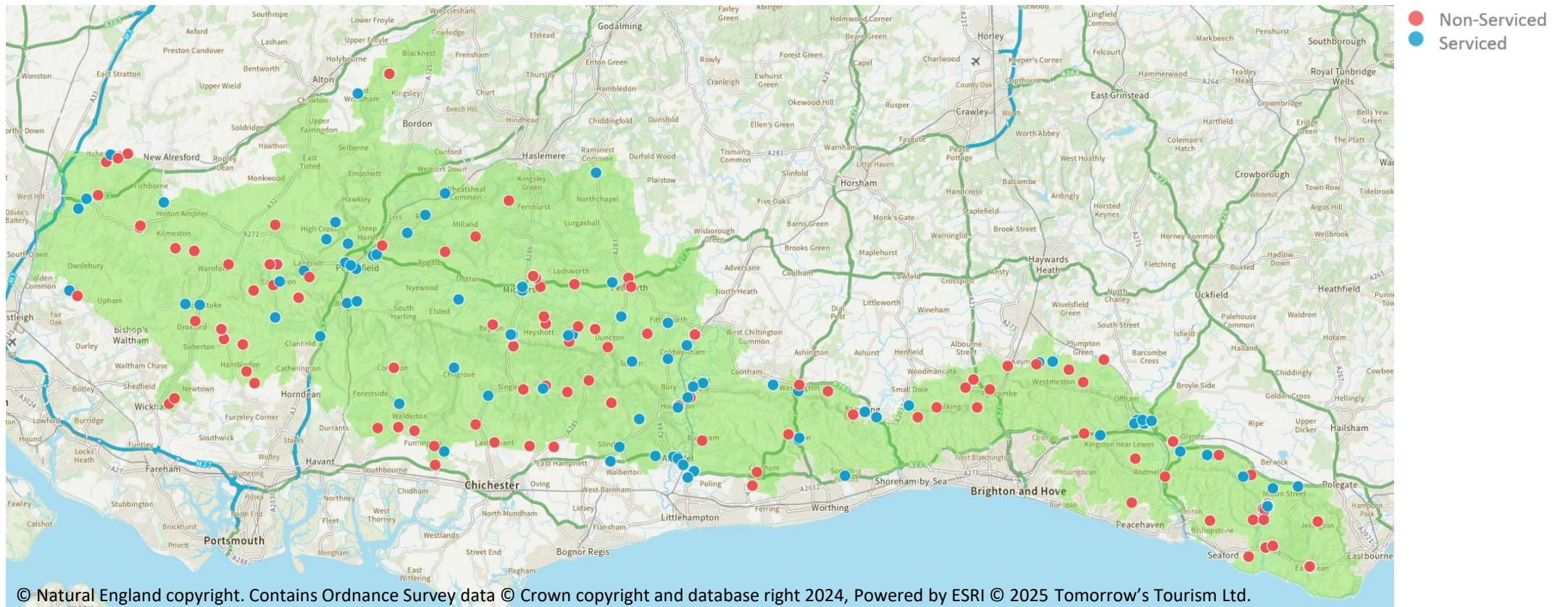
1.1.1 The Tourism Economy – Heat Map - # Establishments



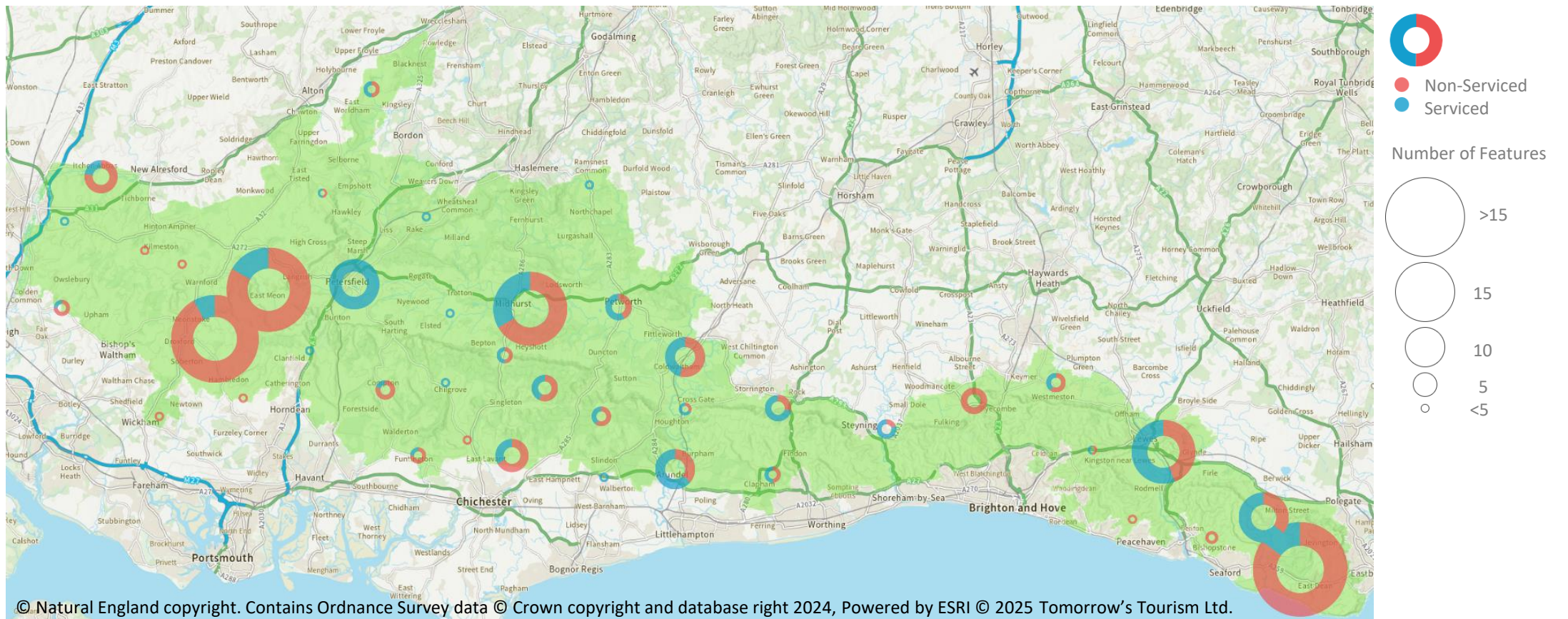
1.1.2 The Tourism Economy – Clusters - # Establishments



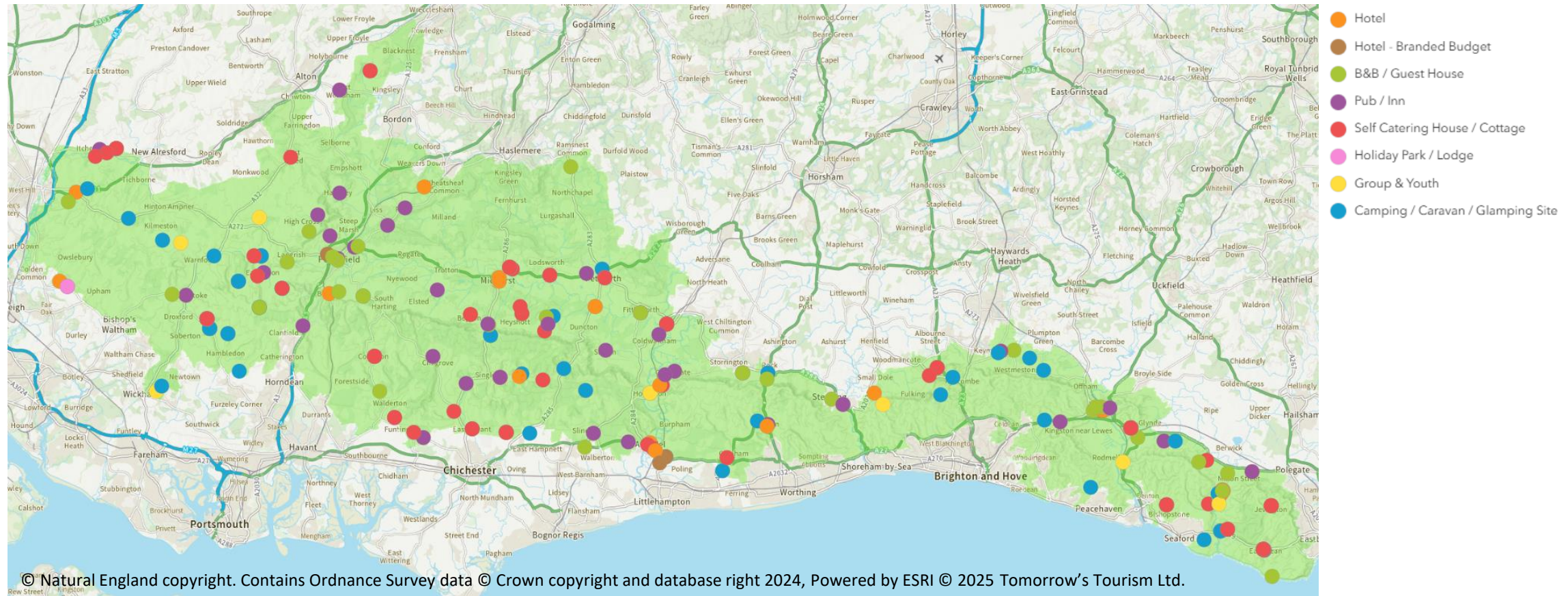
1.1.3 The Tourism Economy – Serviced / Non-Serviced



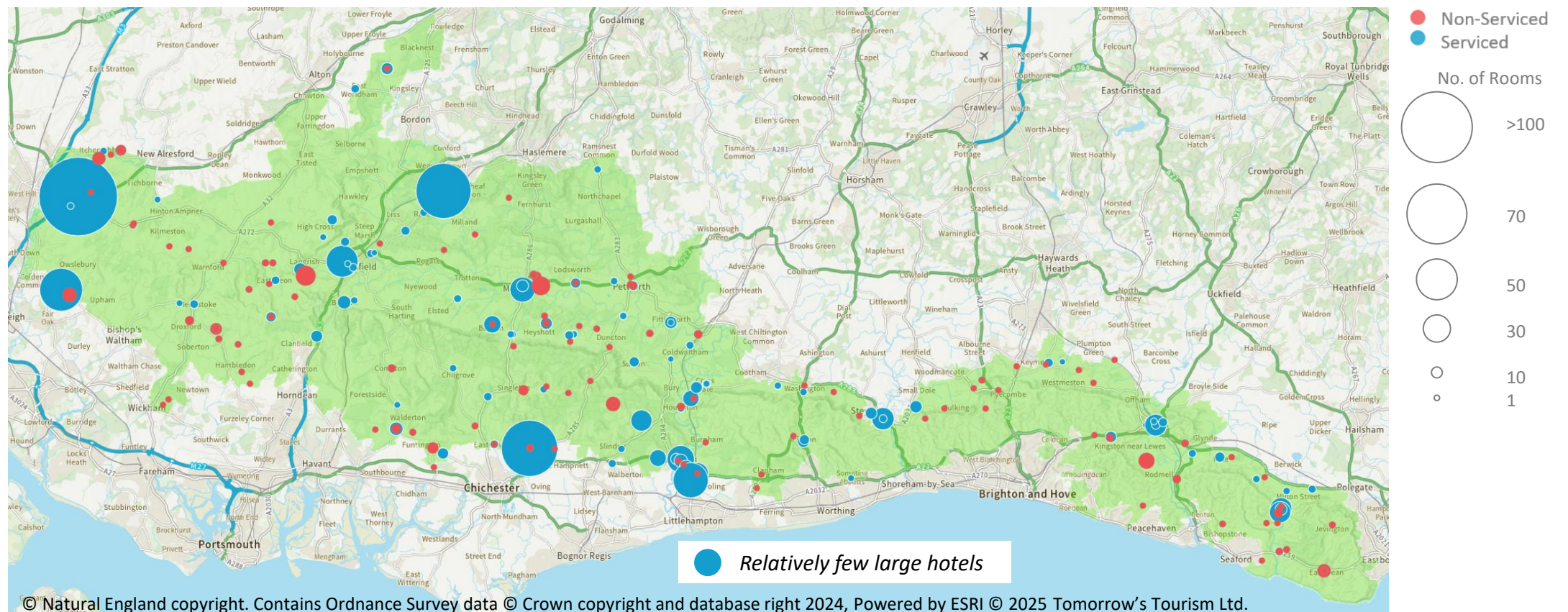
1.1.4 The Tourism Economy – Serviced / Non-Serviced Clusters



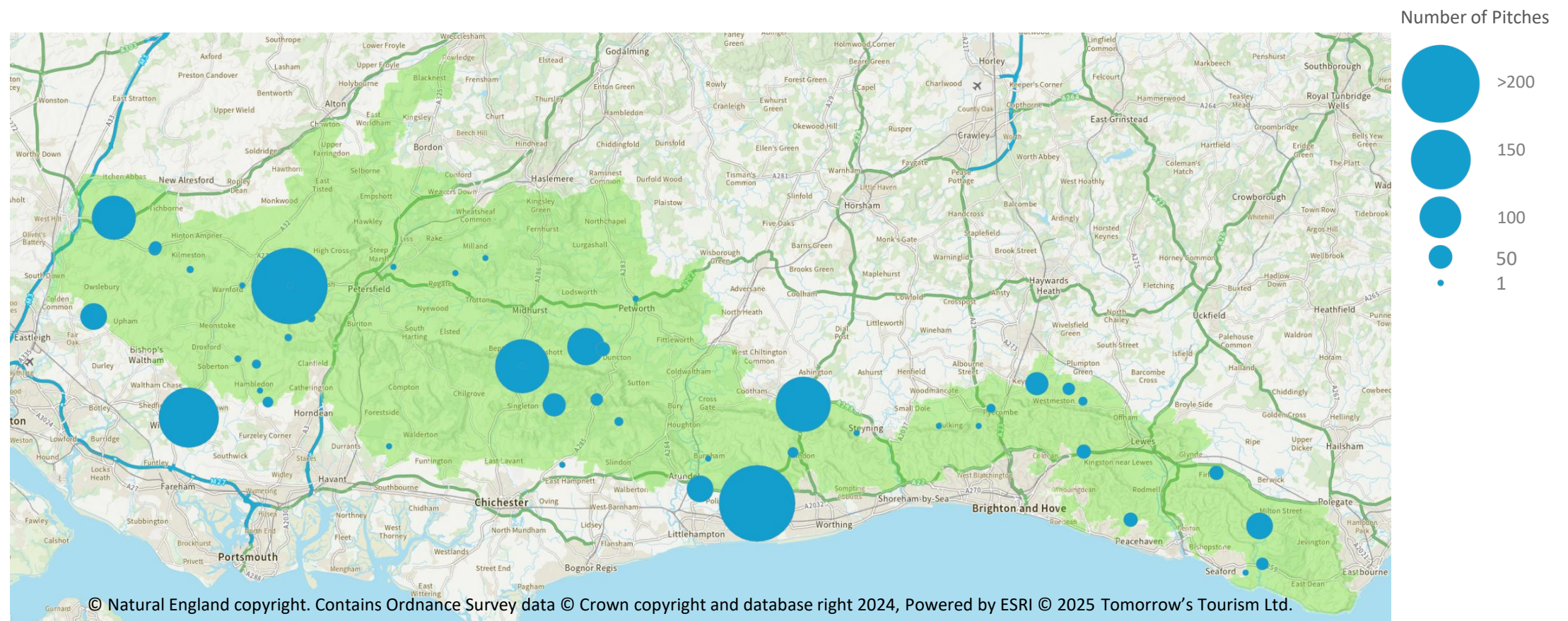
1.1.5 The Tourism Economy – By Type



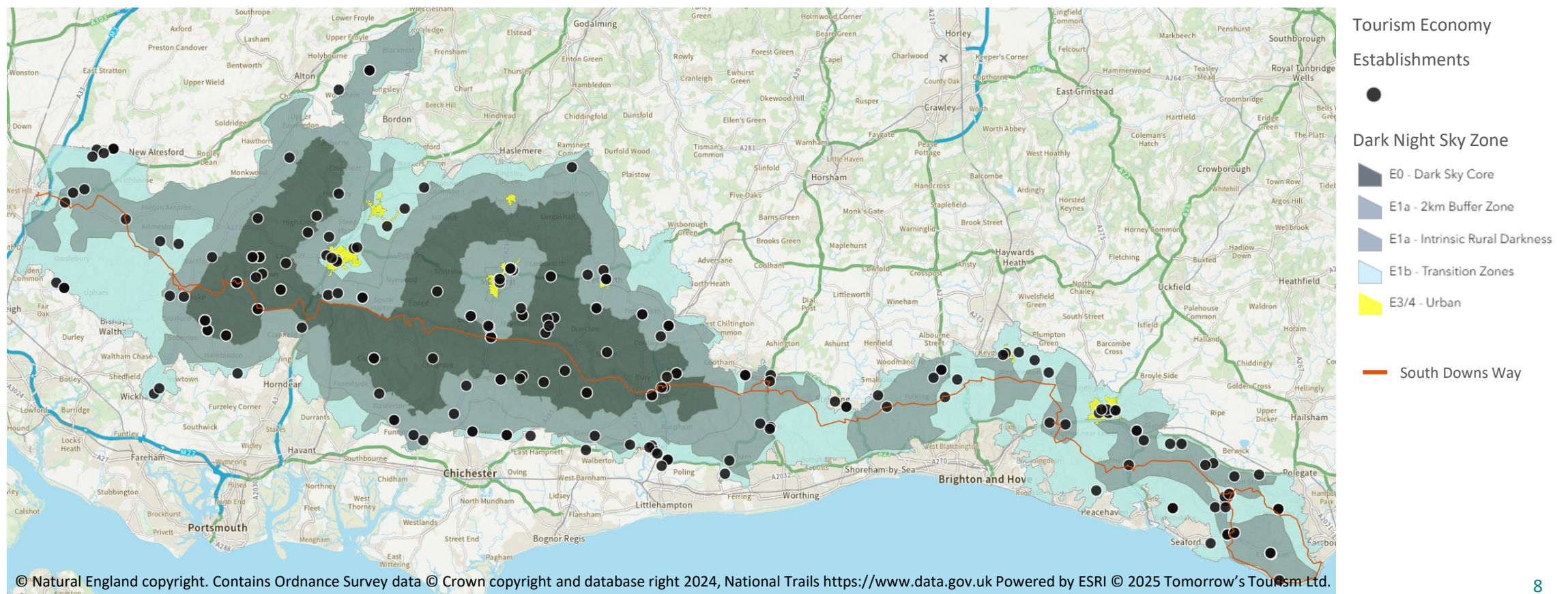
1.1.6 The Tourism Economy – By Type & # of Rooms



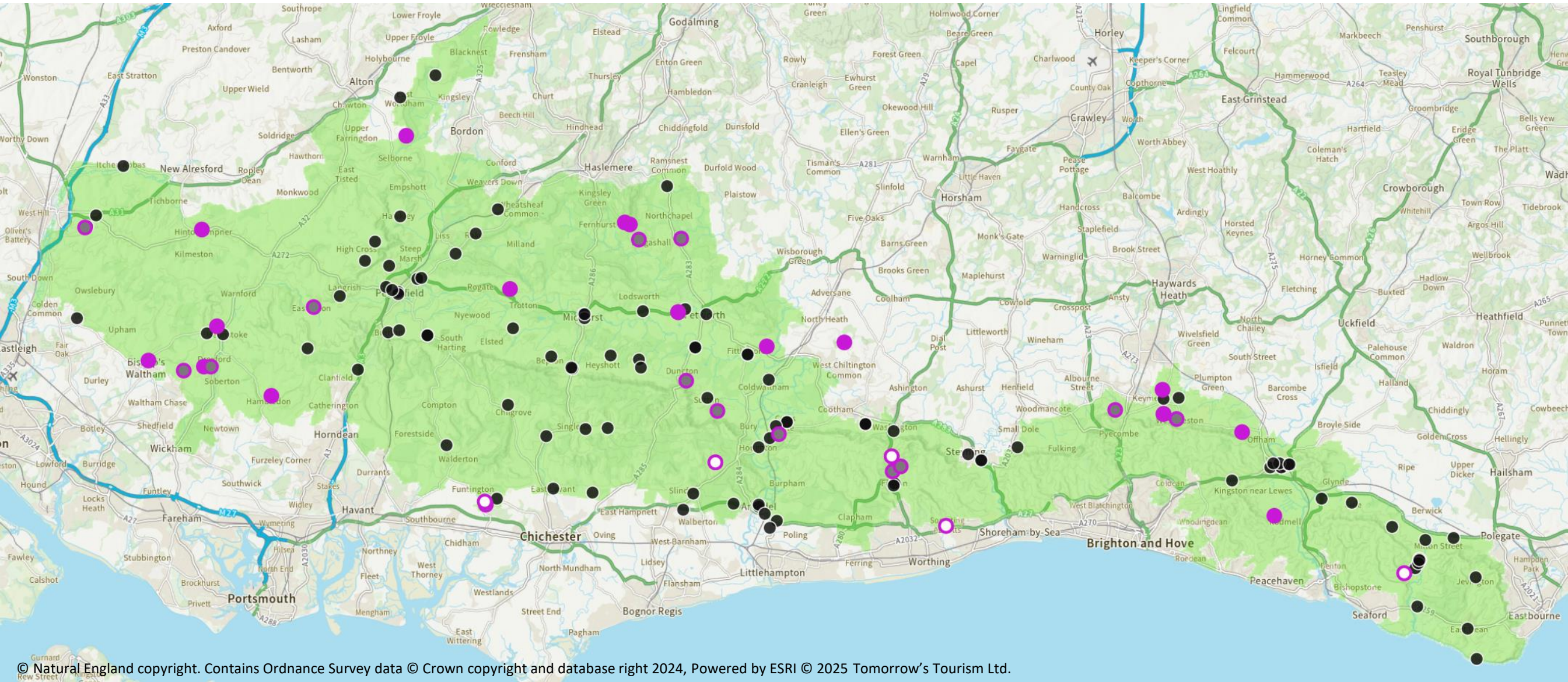
1.1.7 The Tourism Economy – Camping and Caravan Sites



1.1.8 The Tourism Economy – Dark Sky Areas & Potential Tourism Economy Partners



1.1.9 The Tourism Economy – Accommodation and Viticulture Facilities



- Vineyard – Open to Public
- Vineyard – Open to Public + Visitor Accommodation
- Vineyard – Not Open to Public
- Serviced Accommodation

1.2 The Sharing Economy – Accommodation Stock

Figure 5
Listing Type

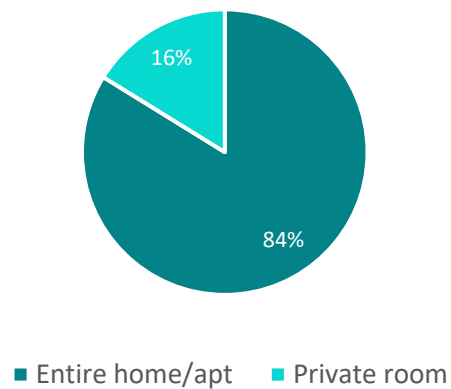
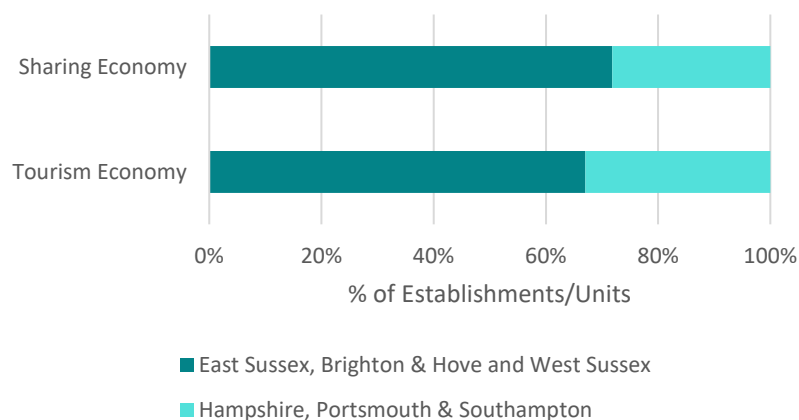


Figure 6
Price Tier²



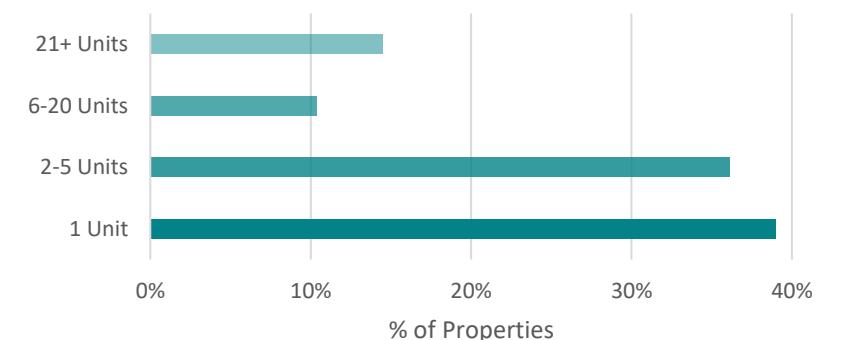
Figure 7
Distribution by LVEP area within SDNP



1. The Sharing Economy in this context refers to short-term let units listed on Airbnb and Vrbo, as reported by AirDNA.
2. Out of a total of 4,680 units registered on Airbnb and Vrbo, there are 1,903 active units¹ within the Park, listed by 1,157 unique hosts. These comprise of 3,703 total rooms, sleeping up to 8,147 guests.
3. Total annual income from Sharing Economy units over the last twelve months was £40,185,358, an average of £21,117 per trading unit
4. The vast majority of units are entire homes/apartments (84%) with an average of 1.9 rooms. Over 60% of hosts have more than one unit available for rent, reflecting the scale of the sector as a business and source of income. The overall result of a high dependence on self-catering properties is often lower economic impact as the serviced sector employs far more people, has greater potential impact on local supply chains, allows career advancement for local people and provides greater revenues for the wider economy.
5. 54% of accommodation is classed as luxury or upscale, while 26% are budget or economy.
6. Average number of rooms is 1.9 per unit with average daily rate of £220,38 bookings per year and total spend per visit of £561.
7. Visitors stayed an average of 3.1 nights with overall occupancy of 52%.
8. 11% of active units use a property manager, the prominent companies being Cottages.com. Henry Adams Holiday lets and Sykes Holiday Cottages.
9. As can be expected, there are higher densities of units around the more populated areas of Lewes, Midhurst, Petersfield, and Petworth. Ditchling, Alfriston, East Dean, Findon, and the areas close to Chichester also have higher densities of sharing economy accommodation – see heat map on page 9.



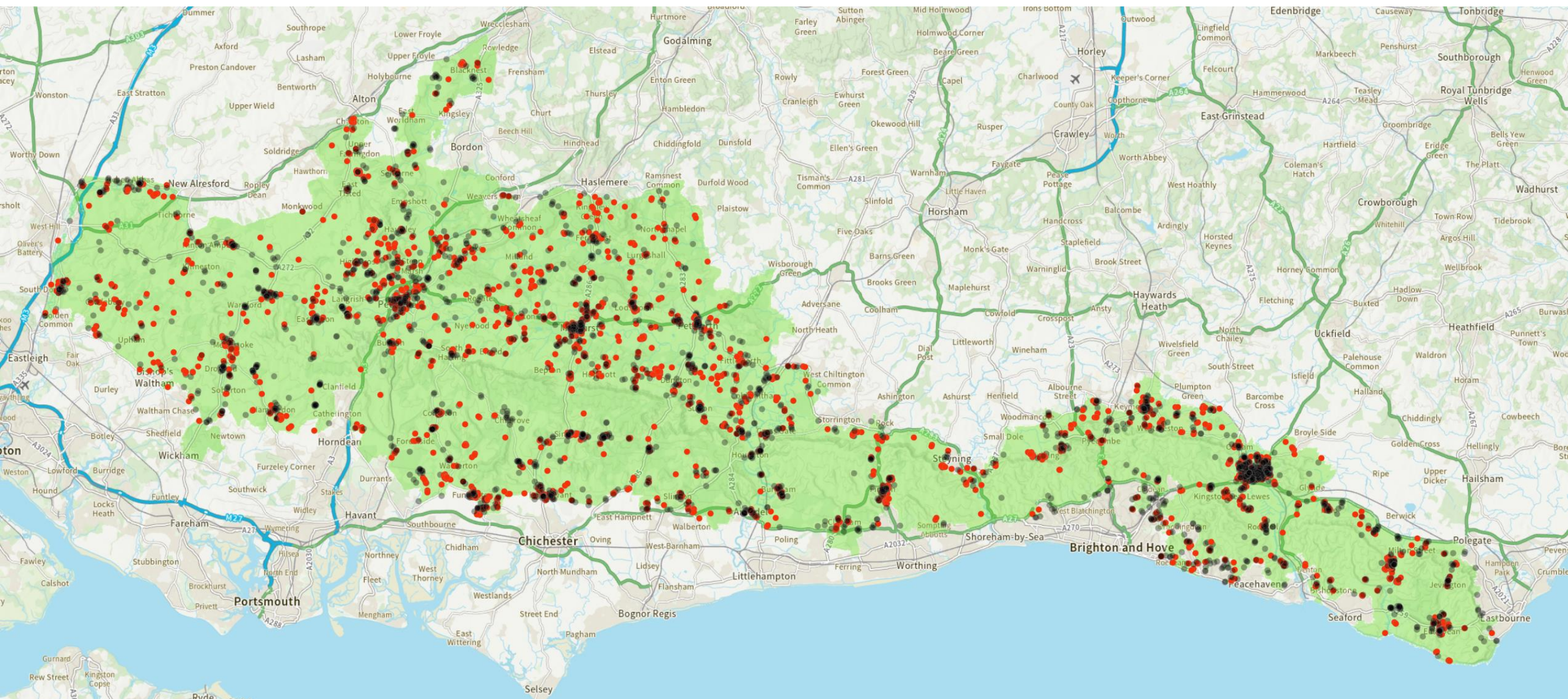
Figure 8
Number of Units per Host



Notes:

1. Active units – those that have generated revenue in the last 12 months (LTM). Note: this figure includes multiple rooms within a single property
2. Airbnb Price Tiers are determined by the Average Daily Rate (ADR) of the property in a specific market and bedroom count.
 - Budget (£): Representing the most affordable options in a market.
 - Economy (££): A step up from budget, offering more amenities or features for a slightly higher price.
 - Midscale (£££): A middle ground, providing a balance of amenities and price.
 - Upscale (££££): Offering a higher level of amenities and comfort compared to midscale.
 - Luxury (£££££): The highest price tier, featuring premium amenities and the most desirable features.
3. It is not possible to isolate the % of properties that drop out / rejoin annually.

1.2.1 The Sharing Economy – Accommodation Distribution



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Active Units

1,903

Active Units

3,703

Bedrooms

8,147

Beds

● Active Units (1,903)
● Inactive Units (2,777)

All Units Registered

4,680

All Units

8,994

Bedrooms

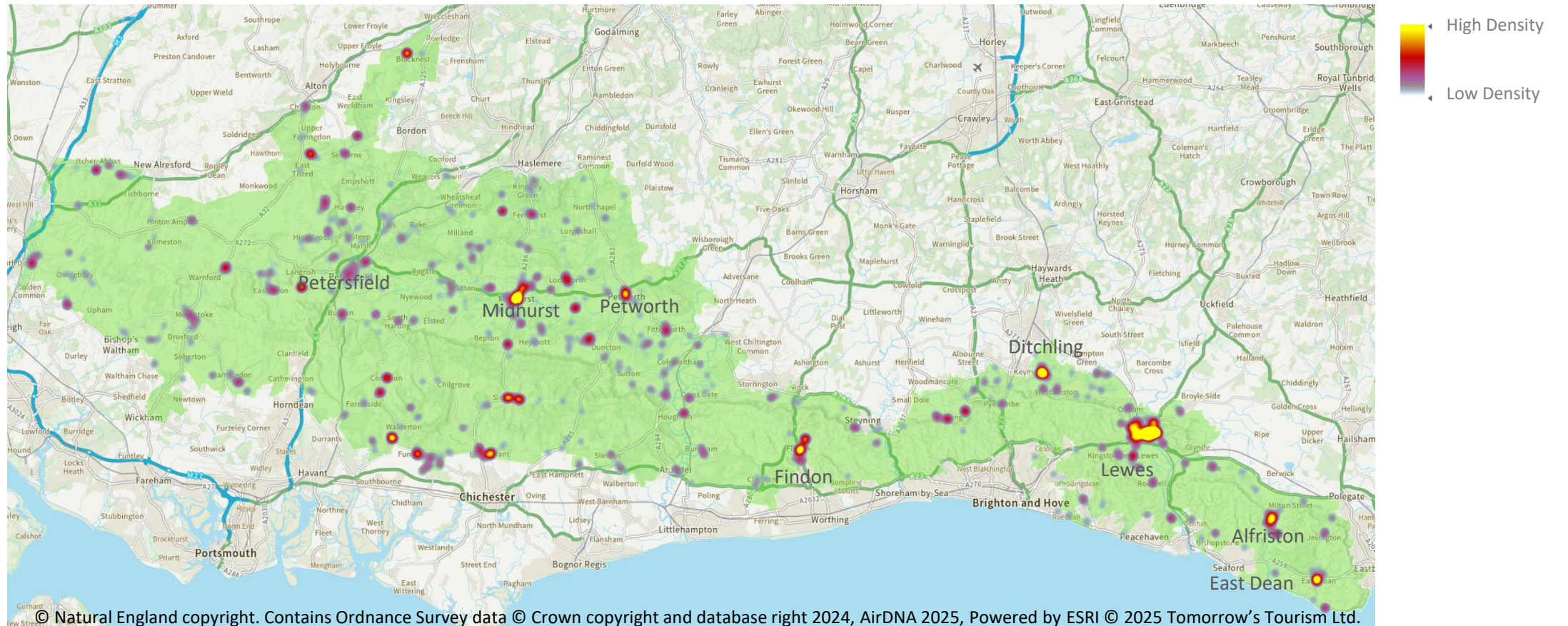
19,923

Beds

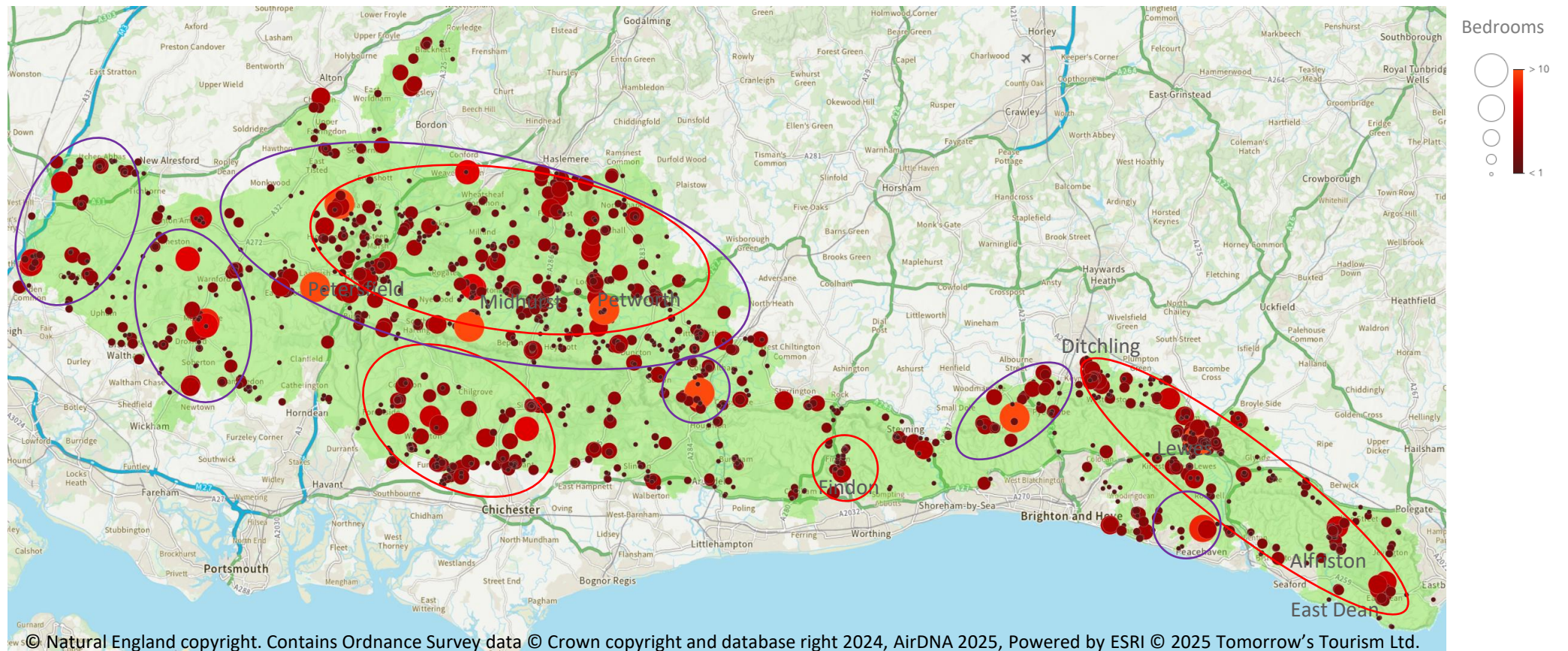
Notes:

- Active units – those that have generated revenue in the last 12 months (LTM). Note: this figure includes multiple rooms within a single property

1.2.2 The Sharing Economy – Active Units Heat Map



1.2.3 The Sharing Economy – Active Units – Size (# Bedrooms)



1.2.4 Sharing Economy – Performance

Figure 9
Sharing Economy Key Figures

	SNDP (2024-25)	Eastbourne (2024)	Peak District National Park (2024-25)
Total Units Active LTM*	1,903	582	3,670
Of which % Airbnb**	92%	76%	85%
Total Revenue LTM	40.2m	£7.2m	£110m
Revenue LTM (Avg)	£21,117	£12,385	£30,081
Occupancy LTM (Avg)	52%	61%	54%
Day Rate LTM (Avg)	£220	£143	£185
Spend per Booking (Avg)	£561	£443	£653
Number of Rooms (Avg)	1.9	1.7	2.3
Length of Stay (Avg)	3.1	3.5	3.4
Booking Lead Time (Avg days)	66.4	55.7	67.5

*LTM = Last 12 Months
**Remaining units on Vrbo

1. Figure 9 to the left provides an overview of some key measures, with comparisons to Eastbourne as a neighbouring area, and to the Peak District National Park as another National Park. Further comparative data is given in Annex 2.
2. The total annual revenue from short-term lets on Airbnb and Vrbo in the South Downs National Park is reported to be £40.2m.
3. Average revenue per unit in the Park is £21,117, significantly higher than neighbouring Eastbourne despite having lower occupancy rates. This reflects the higher average number of rooms, day rates and spend per booking.
4. Bookings in general have increased by an average of 13% year on year since 2021. In terms of seasonality, the Park sees a peak in the summer months with almost half of total bookings taking place between June and September, while bookings dip significantly from January to March.
5. There has not been significant variation in occupancy rates in the last 5 years. The COVID-19 pandemic does not appear to have negatively affected bookings in the National Park; in fact average occupancy rates for 2020 and 2021 were above normal. Mid-week occupancy was also relatively higher during 2020 and 2021. The rise in homeworking during the Pandemic led to increasing numbers of people moving out of big cities to more rural areas in search of bigger homes, cost savings and green space.

Figure 10
Average Occupancy by Day of Week

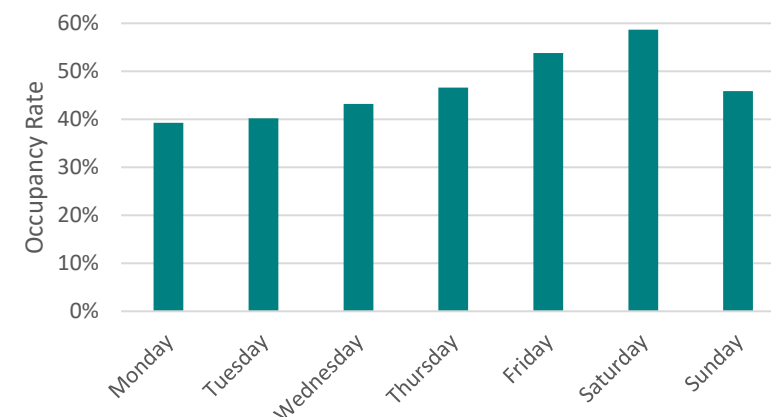


Figure 11
Average Occupancy by year

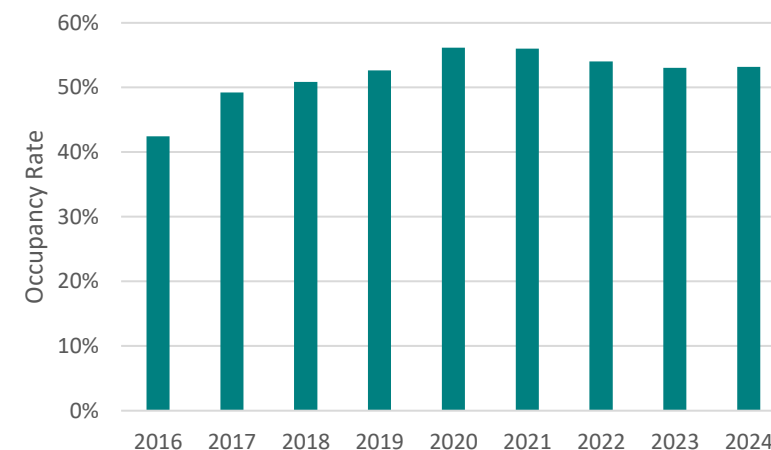
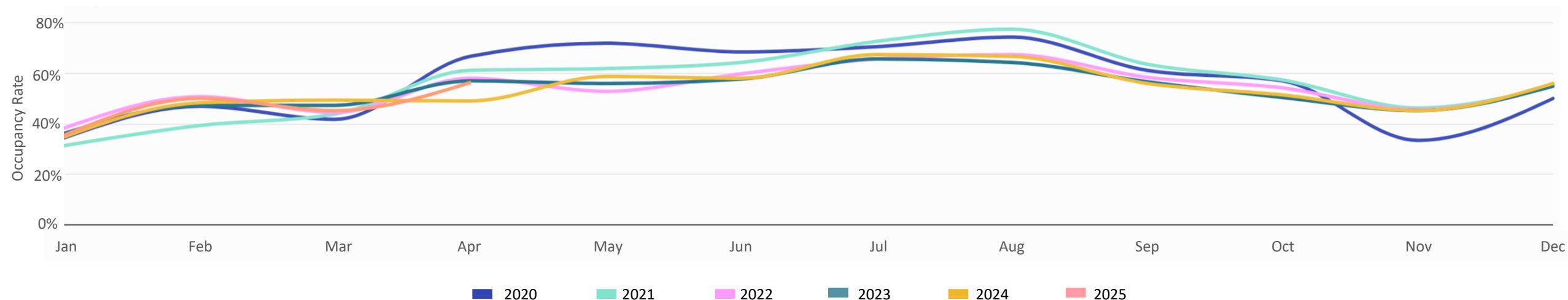


Figure 12
Monthly Occupancy 2020-2025



2. The Accommodation Market

2.1 Volume and Value – National and Regional Context

1. This Section looks at domestic visitors to the counties containing the SDNP (Hampshire, East Sussex and West Sussex, referred to hereafter as the SDNP counties, looking at the counties as a whole), and makes comparisons with the region (the South East, excluding London) and England.

Domestic Visitors

- In 2024, the SDNP counties received 67.2 million domestic trips. Overnight trips made up 9% of these trips, reflecting national and regional trends.¹
- Spend per overnight trip in 2024 was £205 in the SDNP Counties; slightly above the region (£202) but below the national average of £232. Spend per bed night in SDNP counties the was also below average at £97.28 per night (compared to £97.57 for the region and £106.57 for England).
- Breaking down the numbers by average per county, the SDNP counties have outperformed the region in terms of overnight trips, bednights, and spend (until 2024), sitting generally just below the national average (see figures 13 and 14).
- The figures show a decrease from 2022 to 2024 in domestic tourism overnight trips across the geographies, including a significant decrease in bed nights which is a consistent trend across the sector and is likely to relate to the cost-of-living crisis. Meanwhile spend per overnight trip has increased which reflects the impact of high inflation over the past two years. (Figure 14 shows growth in spending in nominal terms).

International Visitors

- There were 4.3 million international visits to the South East region in 2023, up 18% from 2022. The number of nights increased by 5% to 33.8 million and spend increased by 8% to £2.5 billion.³
- Visits to Friends and Relatives (VFR) make up almost half of all international visits, (the national average is 35%). This is significant as this market is less likely to pay for accommodation. The VFR market contributes 40% of total spend.
- The holiday market made up 28% of total visits to the region in 2023 and 32% of spend. Inclusive tours comprise 9% of the holiday market. Business, at 18% of total, will predominantly take place in urban centres and will be far less significant for the National Park.

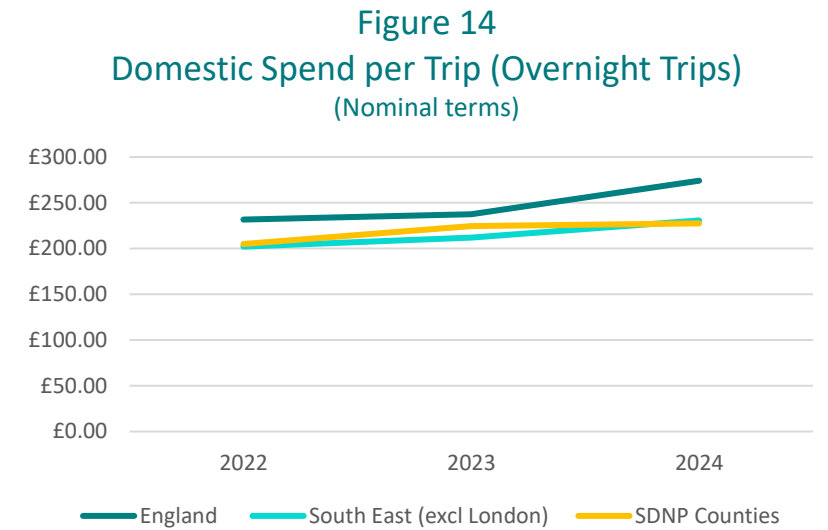
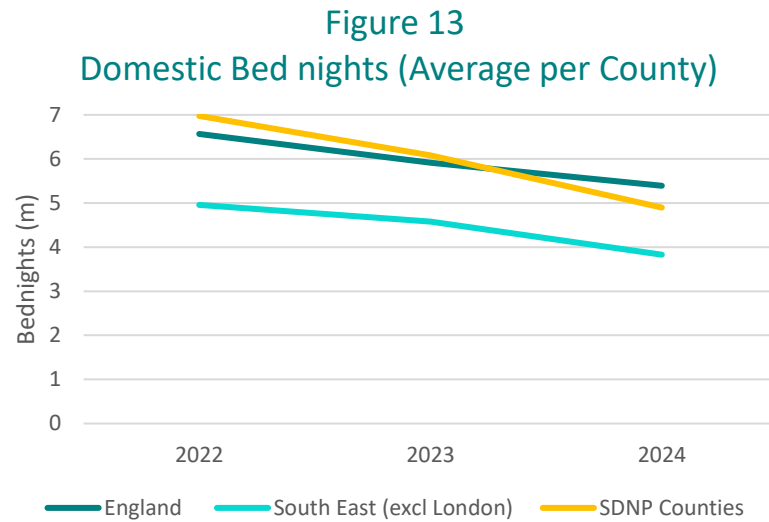
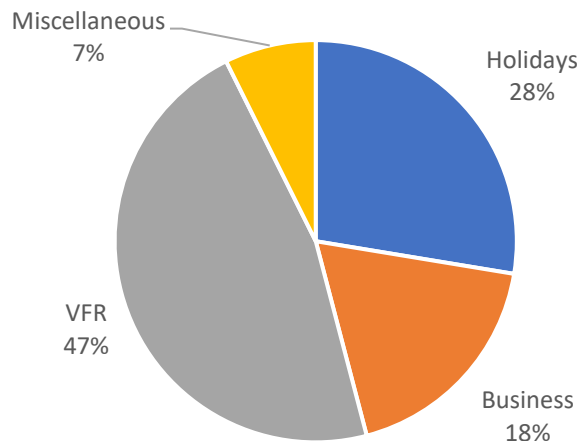


Figure 15
Purpose of International Visits to South East England



The South Downs National Park

- The South Downs attracts an estimated 19 million annual visits, the second highest of any UK National Park. However, at £342 million, the attributed visitor spend was one of the lowest per head due to the majority being day visitors, either living or staying in the surrounding area.²
- In 2021, only 10% of total visitors surveyed were using accommodation inside the National Park, an increase from 6% in 2018.
- The National Park has identified growing international visits as a means to help increase the economic impact of tourism to the South Downs and support employment opportunities by increasing demand and visitor spend.²

Notes:

- Source: VisitBritain - Great Britain Tourism Survey (GBTS). 'Tourism Day Visits' is the standard measure used by VisitEngland, although this doesn't take account of 'Leisure Day Visitors' (those spending less than 3 hours away from home but outside their usual environment, for general leisure, recreational or social purposes.). The actual number of visitors is therefore likely to be significantly higher.
- Source: South Downs National Park Partnership Management Plan 2020-2025
- International Passenger Survey. Data is not available below regional level.
- Due to the methodological changes implemented in data collection post 2019, the data from 2022 onwards cannot be compared to the results up to 2019.

2.2 Visitor Volume and Value – South Downs National Park

18.8m Annual visitors to SDNP	4.4 Average Nights
10% Overnight Stays within National Park	£51 Average Nightly Accommodation Spend

1. An estimated 18.8 million people visit the South Downs National Park annually, the second highest figure for all the UK National Parks.¹ This represents 9% of all trips to the South East region in 2023. 2 million people live within 5km of the National Park, making it popular for day visits.

Visitor Survey

- A visitor survey conducted in 2021² found 77% of respondents to be either local residents (40%) or day visitors (37%). One in eight respondents to the visitor survey (12%) were overnight visitors staying outside of the National Park and 10% were overnight visitors staying within the National Park.²
- Hotels were the most commonly used accommodation type, used by a third (34%) of respondents visiting overnight. Staying with Friends or Relatives was the 2nd most common accommodation type (17%) followed by Airbnb's/Homestays (11%).
- The survey noted an increase of 10% in the proportion of overnight respondents staying in hotels and a decrease of 8% in the those staying with friends and family compared to the previous survey in 2018.
- Within the National Park, stays of the longest duration are made by those in self-catering accommodation (6.0 nights), those staying in a caravan (5.9 nights) and those staying in an Airbnb/ Homestay (5.2 nights).
- The average nightly accommodation expenditure per person was slightly over £51, with no significant difference between those staying inside the National Park and those staying outside it.
- Only a small proportion (2%) of respondents were international visitors, representing 12 different countries. Compared to the previous survey period prior to the COVID-19 pandemic, the percentage of overseas visitors declined noticeably—from 10% (117 respondents) in 2018 to just 2% (24 respondents) in 2021. This reflects COVID-19 impacts and is likely to have broadly reverted to trend by end 2025.

Figure 17
Visitor Type²

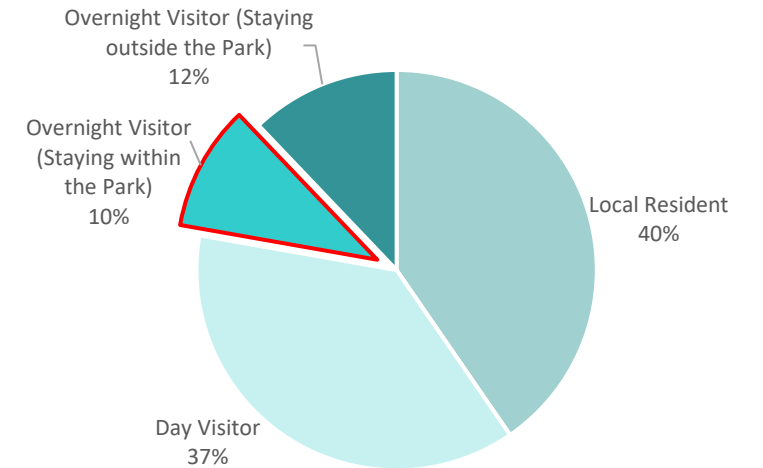


Figure 16
Accommodation Type (2021)

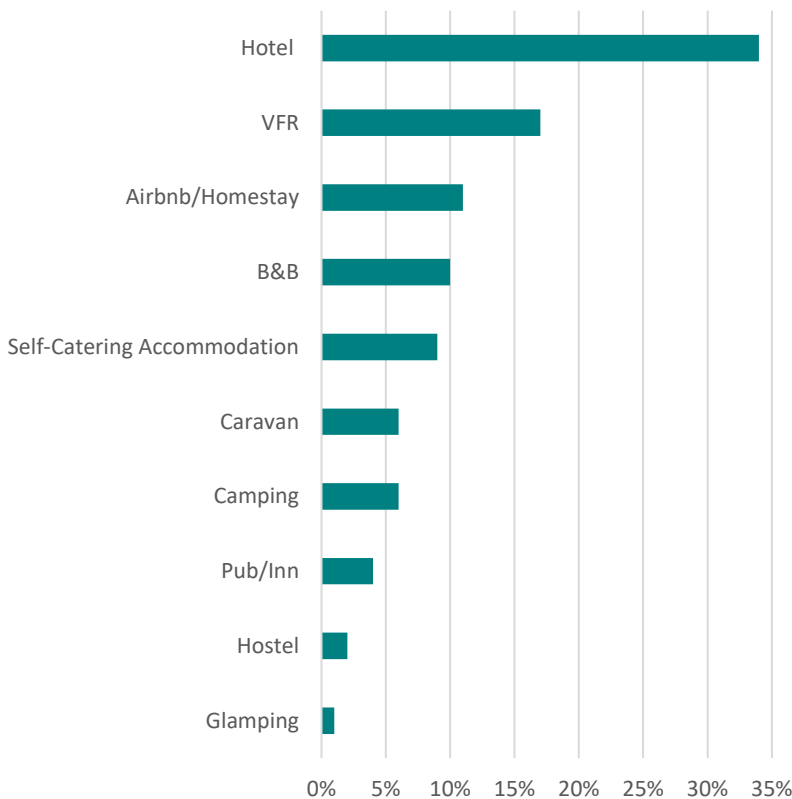


Figure 18
Change in Visitor Type^{2,3}

	2018	2021
Local Resident	35%	40%
Day Visitor	39%	37%
Overnight - Staying outside Park	20%	12%
Overnight - Staying within Park	6%	10%

Notes:

- Source: South Downs National Park Partnership Management Plan 2020-2025
- Source: South Downs National Park Visitor Survey 2021, M·E·L Research
- Definitions of the 4 visitor types were not given in the Visitor Survey Report

2.3 The Accommodation Market – National Trends and Forecasts

Hotels¹

- 1. Market Growth**
The UK hotel market in 2024 was valued at £25.8 billion, up 4% from 2023, driven primarily by a recovery in inbound tourism. However, the volume of trips remains 9% below pre-pandemic levels due to suppressed domestic demand, economic pressures, and competition from holiday rentals such as Airbnb. While long-term market value is expected to increase by 17% by 2029, short breaks continue to be vulnerable to cost-of-living challenges, especially in the mid-market segment.
- 2. Consumer Preferences**
50% of UK adults stayed in hotels in the past year, down from 56% pre-pandemic. Hotels are seeing growing interest in apartment-style accommodations (74% interest), glamping (53%, especially among younger and affluent demographics), and all-inclusive deals (popular with families). Room facilities are the most decisive factor in booking, with strong interest in room selection, late check-out, and cancellation protection.
- 5. Supply-Side Developments**
Major operators like Premier Inn and Hilton are expanding their room offerings and innovating through AI, lifestyle branding, and flexible accommodation formats. Hotel pipeline growth is concentrated in cities and accessible locations, but rising concerns over over-tourism are encouraging a shift towards lesser-visited regions.
- 6. Marketing & Booking Channels**
64% of hotel bookings are now made online, mainly via hotel websites and third-party platforms. Direct booking strategies increasingly target younger travellers, with perks like wellness facilities and app-based engagement.
- 7. Demographic Opportunities**
Older adults (65+) are a growing population segment with a strong preference for comfort and convenience. However, 44% did not take overnight stays in the past year, indicating further potential if confidence and accessibility are improved.

Holiday Rentals²

- 8. Following the easing of COVID-19 restrictions, holiday rental properties proved more resilient than most other forms of accommodation and as a result, the pandemic has increased the segment's client base.**
- 9. The UK holiday rental market, particularly for domestic properties, has shown robust growth and resilience following the COVID-19 pandemic. Holiday rentals retained their expanded market share in 2024.**
- 10. Market Growth**
The number of domestic holiday rental stays reached 8.3 million in 2023, with associated spending rising to £3.3 billion. Forecasts suggest growth to 9.1 million stays and £3.6 billion in spending by 2028.
- 11. Demand Trends**
29% of UK adults stayed in a holiday rental in the last three years, while 52% expressed interest in doing so in the future—indicating strong growth potential.
- 12. Consumer Preferences**
Holiday rentals are valued for privacy, affordability, and self-catering facilities, which are especially attractive during periods of high inflation. “Things to do nearby” is the top factor for renters in choosing a holiday. Private and personalised experiences are increasingly popular and guests are seeking “curated, one-on-one experiences” like guided hikes or natural wine tastings.⁴
- 13. Booking Behaviour**
Airbnb remains the leading booking channel (27%), with many bookings made last-minute and cost being a significant factor in decision-making.
- 14. Demographics**
Younger adults (16–44) are the primary users, but the ageing population presents a significant opportunity. Over-65s prefer rural locations but are deterred by lack of hotel-like services.
- 15. Regulatory Landscape**
The effects of Government plans for licensing and registration schemes to manage short-term lets are not yet known but aims to ensure safety, quality, and community balance. England lags Scotland and Wales in terms of related legislation.

Camping and Caravanning³

- 16. Consumer trends in the camping market and caravanning market in the UK highlight a preference for affordable, unique experiences, with younger generations and families leading the demand. Wellness holidays, nature-based experiences, and premium options like glamping are gaining traction, despite challenges in growth. There is also a growing interest in off-peak camping, with an emphasis on social interaction and eco-friendly accommodations.**
- 17. Performance**
The UK camping and caravanning sector faced a decline in value in 2024 due to weather and economic pressures, though interest remains high, especially among younger generations and families.
- 18. Market Growth**
It is projected that the UK camping market will generate a revenue of £718.19m in 2025, and is estimated to grow annually at a rate of 3.64% resulting in a projected market volume of £811.32m by 2029, with 6.53 million users. The expected average revenue per user (ARPU) for the Camping market is £127.27.
- 19. Customer preferences**
Customers in the UK are increasingly seeking outdoor experiences and activities, driving demand for camping equipment and accessories. The trend towards sustainable and eco-friendly products has also influenced consumer preferences in the camping market, with a growing interest in environmentally conscious camping gear. The UK's camping market has seen a rise in demand for glamping accommodations, reflecting a growing interest in luxury outdoor experiences.

Notes:

1. Source: Mintel Hotels – UK – 2024
2. Source: Mintel Holiday Rental Property – UK – 2023
3. Sources: Mintel UK Camping and Caravanning Market Report 2025; Statista 2025
4. [PhocusWire](#) “Ancillaries in the vacation rentals sector: 'The new frontier'?”, May 19, 2025

Hotels

Holiday Rentals

Camping / Caravanning

2023 - 2024

- Value of hotel market reached record highs, while volume remained below pre-pandemic levels.
- Challenges due to inflation, slow recovery in business travel, competition from holiday rental properties, reduced appeal of short stays due to rising costs of living.

- Holiday rental properties expected to outperform overall domestic holiday market despite economic crisis.

- Decline in value due to weather and economic pressures.

2025

- Higher operational costs weaken wage growth and push up prices, further hampering recovery of short UK breaks.

- Potential to grow even more once economy stabilizes.
- New regulations could increase consumer confidence in booking but may negatively impact number of listings.

- Projected to generate increased revenue of £718.19m in 2025.
- Increase in sales of camping equipment.

2026 - 2029

- Increased focus on efficiency gains e.g.
 - AI projects
 - Increased supply of apartment-style hotels to boost long-stays
 - Increase add-ons in booking systems to boost revenue
- Opportunity to strengthen position among older demographic.
- Greater focus on wellbeing, experiences and environmental initiatives to broaden appeal.
- Over-tourism concerns leading to focus on lesser-visited regions.
- Value growth in UK tourism will be led by premium sectors such as holiday cottages, luxury hotels and wellness breaks.

- Holidays expected to remain a consumer priority, benefitting holiday rental properties.
- Innovations around experiences and sustainability essential to growth.
- Value growth in UK tourism will be led by premium sectors such as holiday cottages, luxury hotels and wellness breaks.

- Estimated to grow annually at a rate of 3.64% resulting in market volume of £811.32m by 2029, with 6.53 million users.
- Expected average revenue per user (ARPU) for the camping market is £127.27.

SDNP Trend

Continued decline unless sites can be made available and planning process simplified

Continued modest increase but levelling off in terms of the 2015 – 2025 growth trend. Professional sector can drive shoulder and off-season use

Growth opportunity but economic impact is significantly less than the serviced offer.

Notes:

1. Sources: Mintel Hotels – UK – 2024; Mintel Holiday Rental Property – UK – 2023; Mintel UK Camping and Caravanning Market Report 2025

2.4 Implications for South Downs National Park

Given the South Downs' appeal as a natural, rural tourism destination, the following implications from the national trends and forecasts covered in this section are noteworthy:

- 1. Glamping and Unique Stays**
The Park is well-placed to tap into the growing appetite for glamping and experiential stays in nature, especially among younger, higher-spending travellers.
- 2. Rising Demand for Rural Holiday Rentals**
SDNP, as a largely rural destination, aligns with the rising preference for countryside stays. The appeal of natural beauty, outdoor activities, and tranquil settings fits the profile of holiday rental guests—especially older adults seeking quiet, well-serviced locations.
- 3. Opportunities for Local Hosts**
The growth in domestic tourism and increased interest in holiday rentals suggest opportunities for residents and local businesses in the National Park to enter or expand within the short-term rental market. Providers offering cottages or lodges with self-catering facilities stand to benefit most.
- 4. Appealing to Older Visitors**
With older adults being more selective, SDNP properties could gain traction by offering hotel-like amenities such as housekeeping, reception services, or accessibility features like ground-floor bathrooms and step-free access. Enhancing accessibility, comfort, and customer service could support the region in capturing more of the growing senior market, especially through all-inclusive packages and transport services.
- 5. Sustainability and Community Impact**
Brands like Sykes Holidays (a Certified B Corp) emphasise environmental responsibility, a value shared by the National Park ethos. Building further on the work of the Our South Downs business network in encouraging sustainable practices among holiday rental providers in SDNP could help improve local acceptance and preserve the area's character. With 86% of UK holidaymakers preferring less-crowded destinations, the South Downs can capitalise on its rural, tranquil image amid rising concerns about over-tourism elsewhere.
- 6. Planning and Regulation Readiness**
With new national regulations on short-term lets in the pipeline, SDNP authorities and local authority districts should prepare to integrate licensing and data sharing frameworks, potentially collaborating with platforms and tourism bodies to ensure compliance and community benefit. There is a range of benefits that will accrue from bringing the sharing economy businesses into the fold.

- 7. Experiences**
Given that “things to do nearby” is the top factor for renters, SDNP accommodation can be effectively marketed around local attractions and experiences, walking trails, heritage sites, and local produce including vineyards. Using filters and personalization tools (as seen on Airbnb and Sykes) can help connect potential visitors to SDNP experiences. The growing popularity of experiential tourism is also a great opportunity to promote the Park's Dark Skies experiences. Many experiences can also provide year-round options, reducing seasonality and overcrowding.
- 8. Group-Friendly and Flexible Accommodation**
Demand for family rooms, adjoining rooms, and apartment-style facilities suggests that diversified lodging formats—including high-end self-catering cottages or farm-based accommodation—could thrive.
- 9. Digital Strategy**
Strong online booking functionality and user-friendly presentation of local experiences—such as walking tours, farm visits, or wellness retreats—can help smaller operators compete more effectively.

A Recap of UK Domestic Tourism Trends

- 1.** After the market declined by 5% in 2023 due to the cost-of-living crisis and a bounce-back in overseas holidays, the volume of domestic holidays is estimated to have increased by 5% again in 2024.
- 2.** City breaks continue to account for the largest value share by location in the UK domestic tourism market. However, the demand for sustainable and local experiences presents opportunities as travellers are increasingly seeking authentic breaks and eco-friendly holidays that support local communities and environments.
- 3.** The cost-of-living crisis is having contradictory impacts on domestic tourism. Many consumers are reducing their frequency of travel and holiday spend or choosing cheaper accommodation. At the same time, 29% of UK holidaymakers are opting for a budget staycation instead of going abroad. However, domestic tourism faces renewed competition from a recovering post-COVID-19 overseas holiday market. Consumers who are less affected by the cost-of-living crisis are opting for trips abroad in greater numbers than at any time since 2019.
- 4.** This is a key challenge to the UK domestic tourism market as lower-cost packages and outbound destinations offer better perceived value and draw consumers away from domestic trips. Combined with economic uncertainty, there is increased pressure to retain customer loyalty.

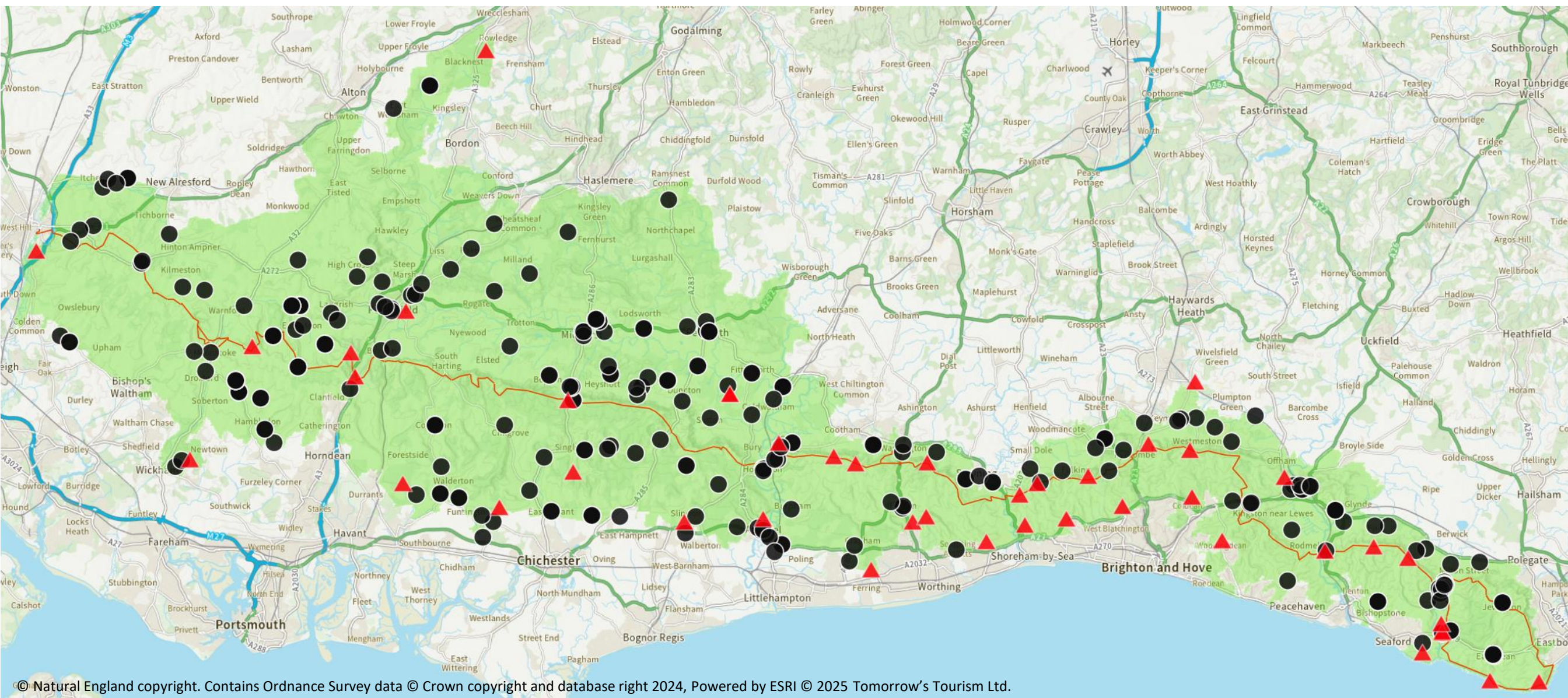
A Recap of UK Inbound Tourism Trends

- 5.** VisitBritain forecasts 43.4 million visits and £33.7 billion spend in 2025. Compared to 2024, this is growth of 5% in visits and 7% in nominal spend (4% in real spend). This would be 106% and 118% of the 2019 levels respectively, although spend is 93% of the 2019 level when adjusted for inflation (VisitBritain).
- 6.** Visits to Friends & Relatives (VFR) lead the recovery, with trips and spend tracking well above pre-COVID and showing continued growth. Holiday visits have almost reached pre-COVID levels and are growing, although spend is down in real terms. Business visits continue to lag behind.



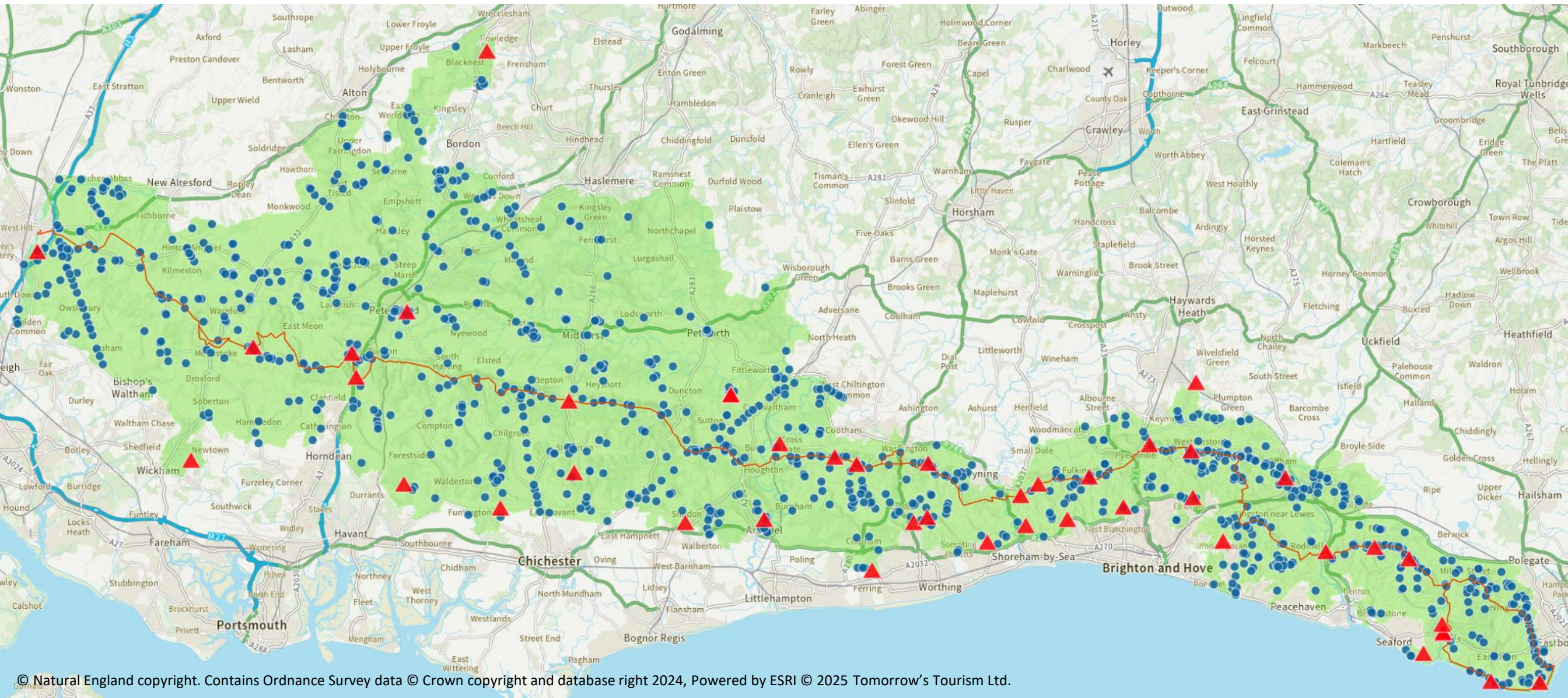
3. Key Issues

3.1 Identification of Honeypots Sites and Tourism Economy Accommodation



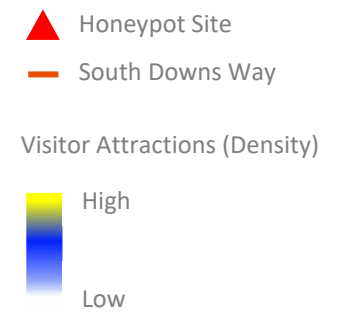
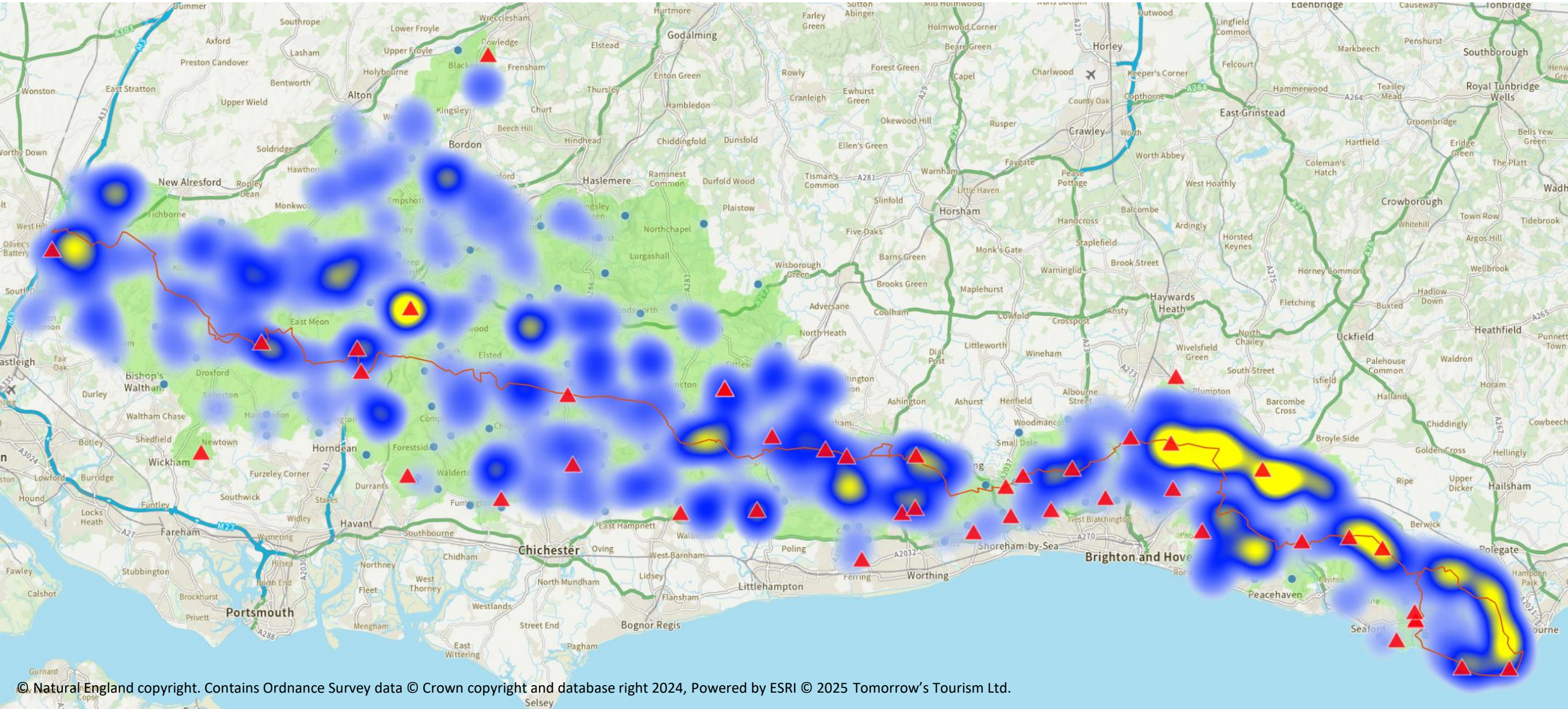
- ▲ Honeypot Site
- Tourism Economy Accommodation
- South Downs Way

3.2 Identification of Honeypot Sites & Visitor Attractions



- ▲ Honeypot Site
- Visitor Attraction
- South Downs Way

3.3 Identification of Honeypots - Attractions Heat Map



3.4 Identification of Gaps and Oversupply

Accommodation Supply and Demand

1. The maps in Section 1 show various views of clusters and types of accommodation in the tourism and sharing economies.
2. The table below shows the number of bedspaces occupied based on an occupancy rate of 58.7% for Tourism Economy accommodation and 52% for Sharing Economy accommodation in the National Park. The total supply is circa 6.2 million bednights per year with the Tourism Economy offering 57% of total bedspaces. Theoretical occupancy is based on a total of 325 days per year operation, taking account of refurbishments and unforeseen closures.
3. Current demand is estimated on the basis of 2019 GBTS figures for National Parks, as shown in Appendix II, as this is currently the most accurate way of assessing demand. Demand in 2019 is likely to be similar to current visitor numbers. An estimate of 100,000 international visitors is added to the domestic demand of 2,948,000 giving a total of over 3 million bedspaces per year.
4. The work undertaken has confirmed that accommodation supply currently exceeds visitor demand, which is a change to the findings of the 2014 report. This has been facilitated by the growth of the Sharing Economy via Airbnb and related channels. This has seen a rise from a marginal number of listings in 2014 to 1,903 trading properties offering 3,703 rooms across the National Park in 2025.
5. There is no immediate need that cannot be met by existing accommodation. Indeed, it is likely to be more important to raise occupancy for the existing accommodation base and support these businesses to improve their performance and also contribute to the special qualities of the National Park.
6. Wine tourism is becoming more popular and remains an opportunity for the South Downs National Park given that 25% of all vineyards in the UK are in Sussex. This viticulture industry is growing and can be supported by related accommodation, both on the vineyard estates themselves and through symbiotic relationships with nearby accommodation providers. Currently only four vineyards offer accommodation and there is significant growth potential, both in terms of new supply and new demand.

Figure 19
Total Accommodation Supply against Demand

Sub Category	Est.	Bedspaces	Occupancy %	Utilised Bedspaces 2024 ¹	Total Annual Supply ²	Demand (2019) ³
Hotels	23	1,714	58.7%	326,988	557,050	
B&Bs and Guest Houses	47	322	58.7%	61,430	104,650	
Pub / Inn	42	582	58.7%	111,031	189,150	
Self-catering	121	758	58.7%	144,607	246,350	
Camping, caravanning & glamping	68	7,399	58.7%	1,411,544	2,404,675	
Group/hostels/holiday park	12	135	58.7%	25,755	43,875	
Tourism Economy Total	313	10,910	58.7%	2,081,355	3,545,750	
Sharing Economy Total	1,903	8,147	52.0%	1,376,843	2,647,775	
Grand Total	2,216	19,057	57.9%	3,458,198	6,193,525	3,048,000

Visitor pressure at key sites

1. There is a current challenge regarding the numbers and management of visitors to various popular honeypot sites across the South Downs National Park. This particularly concerns day visitors to around 40 key sites (the honeypot sites identified on pages 21, 22 and 23) and is more pronounced in the eastern area (56% of sites), with the central and western areas containing a further 27% and 17% of sites which experience high footfall, respectively.

Evidence from the 2021 South Downs National Park Visitor Survey

1. Comparing the type of visitors by location shows that **Beachy Head** was the only area that had more overnight visitors (59%) than non-overnight visitors (42%). Other locations with comparatively high proportions of overnight visitors include **Alfriston** (41%), **Petworth** (40%) and **Lewes** (39%).
2. The locations where local residents (i.e. those living within 10 miles) made up the majority (50% or more) of visitors were: **West Walk** (82%) **Blackdown** (79%), **Petersfield Heath** (67%), **Kingley Vale** (64%), and **Cissbury/Chanctonbury** (60%).
3. Anecdotal evidence from the 2021 Visitor Survey suggests that **Birling Gap** was the most popular destination among international visitors, with eight respondents indicating they had visited. All other sites were visited by no more than two overseas respondents.

Notes relating to Figure 19:

1. Utilised Bedspaces 2024 = Total Bedspaces x Average Occupancy x 325 days - to allow for refurbishments
2. Total Annual Supply = the total number of bed-spaces over 325 days. Assumes 2 people per room and 100% occupancy.
3. Demand (2019) reports demand from the GBTS survey Total # Nights (Holiday and Business) in SDNP.

3.5 Identification of Affordable, Sustainable and Accessible Accommodation

Affordability

1. An analysis of affordable accommodation options found that around 23% of Tourism Economy establishments have options available for up to £100 per night (based on 2 people sharing). Of these 70% are in the serviced category and 30% non-serviced.¹
2. Looking at average daily rates (ADR) in the sharing economy, 27% of units were under £100 per night. However, when calculated based on the equivalent price for two people, this figure increases to 59% of properties.

Accessibility

1. An analysis of accessible supply found relatively few properties with measures in place and information hard to access.
2. In total, 35 tourism economy properties were found to have accessibility measures in place. These are operated by 10 businesses, representing 4% of the total number of businesses. The majority are self-catering units (28), with 3 serviced accommodation providers and 3 glamping sites also reporting accessibility measures.²

Sustainability

1. 22% of visitor accommodation businesses recorded within the National Park in the Tourism Economy audit are Our South Downs members, and 6% of businesses have a Green South Downs certificate.
2. There are at least 6 further Our South Downs members in the Sharing Economy, at least 3 of which have a Green South Down's certificate.³
3. The uptake of sustainability and accessibility themes is not as advanced in the SDNP as some other National Parks / rural destinations. This issue is further analysed in the Final Report.

Notes:

1. Prices are based on 2 people sharing for one night. Tourism Economy uses low season prices where available. Sharing Economy uses ADR so it is not possible to make a direct comparison between the Tourism and Sharing Economies.
2. Accessibility Sources: Responsible Travel, AA, Booking.com, Business Surveys conducted by Tomorrow's Tourism as part of this study. Other sources were consulted but did not produce any results.
3. The number of Our South Downs and Green South Downs members in the Sharing Economy is difficult to discern as it is not always possible to match Airbnb property titles with their records in the members list.



The Tiger Inn East Dean, Wealden Image, 2021 Shutterstock

Annex 1 – Vineyards within SDNP

Name	Vineyard / Winery	County	Postcode	Open To Public	Visitor Accommodation
Chilcomb Valley Vineyard	Vineyard with Winery	Hampshire	SO21 1HR	No	No
East Meon Berrygarden Vineyard	Vineyard	Hampshire	GU32 1NJ	No	No
Wyches Vineyard	Vineyard with Winery	Hampshire	SO32 2UQ	No	No
Barlavington Vineyard	Vineyard with Winery	West Sussex	GU28 0LF	No	No
Exton Park Vineyard	Vineyard with Winery	Hampshire	SO32 3NW	Yes	No
Hambledon Vineyard	Vineyard with Winery	Hampshire	PO7 4RY	Yes	No
Northbrook Vineyard	Vineyard with Winery	Hampshire	SO32 1FB	Yes	No
Otium Wine Estate	Vineyard with Winery	Hampshire	GU34 3FB	Yes	No
Poppydown Vineyard & Winery	Vineyard with Winery	Hampshire	SO32 3AH	Yes	No
Raimes Family Vineyard	Vineyard with Winery	Hampshire	SO24 0JY	Yes	No
Black Dog Hill Vineyard	Vineyard with Winery	East Sussex	BN6 8XG	No	No
Blackdown Ridge Estate	Vineyard with Winery	West Sussex	GU27 3BT	Yes	No
Breaky Bottom	Vineyard with Winery	East Sussex	BN7 3EX	Yes	No
Court Garden Vineyard & Winery	Vineyard with Winery	East Sussex	BN6 8TH	Yes	No
Ebernoe Vineyard	Vineyard with Winery	West Sussex	GU28 9LH	No	No
Everflyht Vineyard (Chalk House)	Vineyard with Winery	East Sussex	BN6 8XB	Yes	No
Meadow Farm Vineyard	Vineyard	West Sussex	PO18 8DN	No	No
Nyetimber Vineyard	Vineyard with Winery	West Sussex	RH20 2HH	Yes	No
Nyetimber - Downs Farm	Vineyard with Winery	West Sussex	BN18 9LZ	No	No
Nyetimber - Upperton Vineyard	Vineyard with Winery	West Sussex	GU28 ORD	No	No
Plumpton College	Vineyard with Winery	East Sussex	BN6 8XB	Yes - Courses	No
Red Admiral Vineyards	Vineyard with Winery	Hampshire	SO32 3PT	No	No
Roebuck Estates - Hazlehurst Vineyard	Vineyard with Winery	East Sussex	TN5 7LF	No	No
Roebuck Estates - Little Brockhurst Vineyard	Vineyard with Winery	West Sussex	GU28 9HA	No	No
Roebuck Estates - Roman Villa Vineyard	Vineyard with Winery	West Sussex	RH20 1PH	No	No
Roebuck Estates - Upperton Vineyard	Vineyard with Winery	West Sussex	GU28 ORD	Yes	No
Stopham Vineyard	Vineyard with Winery	West Sussex	RH20 1EE	Yes	No
Sugrue South Downs - Mount Harry Vineyard	Vineyard with Winery	East Sussex	BN7 3QN	Yes	No
Trotton Estate Vineyards	Vineyard with Winery	West Sussex	GU31 5DB	Yes	No
Weyborne Estate	Vineyard with Winery	West Sussex	GU27 3DR	Yes - Private events	No
Wiston Estate - Broadwoods Vineyard	Vineyard with Winery	West Sussex	BN14 0RH	No	No
Wiston Estate - Findon Park Vineyard	Vineyard with Winery	West Sussex	BN14 0RL	No	No
Wolstonbury	Vineyard with Winery	West Sussex	BN6 9BD	No	No
Ashling Park Vineyard	Vineyard with Winery	West Sussex	PO18 8DP	Yes	Yes
Madehurst Lodge Vineyard (Pig Hotel)	Vineyard with Winery	West Sussex	BN18 0NL	Yes	Yes
Rathfinny Estate	Vineyard with Winery	East Sussex	BN26 5TU	Yes	Yes
Titch Hill Wines - Sompting Estate - Downs Barn	Vineyard with Winery	West Sussex	BN15 0AZ	Yes	Yes
Wiston Estate - North Farm Vineyard	Vineyard with Winery	West Sussex	RH20 4BB	Yes	Yes

Annex 2 – Airbnb Performance Comparison

Period	Market	Listing Nights Available	Listing Nights Booked	Room Nights Available	Room Nights Booked	Revenue	ADR	RevPAR	Available Listings	Booked Listings	Occupancy Rate	Length of Stay (nights)	Booking Lead Time (days)
Apr 2016	Peak District National Park	1,998	903	4,115	1,975	£140,605	£156	£70	82	78	45%	2.9	54.9
Apr 2016	South Downs National Park	1,171	457	1,696	711	£56,557	£124	£48	69	64	39%	3.0	18.6
Apr 2017	Peak District National Park	8,491	5,493	16,337	10,561	£866,615	£158	£102	330	326	65%	3.0	59.8
Apr 2017	South Downs National Park	26,232	13,358	43,913	23,526	£1,901,890	£142	£73	1,115	1,065	51%	3.0	48.3
Apr 2018	Peak District National Park	28,366	16,619	60,150	35,195	£2,777,524	£167	£98	1,092	1,078	59%	3.7	54.3
Apr 2018	South Downs National Park	39,401	18,640	71,238	34,328	£3,005,197	£161	£76	1,694	1,583	47%	3.3	59.6
Apr 2019	Peak District National Park	35,243	24,175	76,648	51,463	£4,888,262	£202	£139	1,447	1,359	69%	3.6	56.4
Apr 2019	South Downs National Park	48,818	26,828	88,500	48,662	£4,059,939	£151	£83	2,077	1,987	55%	3.2	54.2
Apr 2020	Peak District National Park	20,430	13,276	43,924	27,787	£2,283,234	£172	£112	1,302	1,007	65%	5.8	64.2
Apr 2020	South Downs National Park	18,855	12,571	34,583	21,294	£1,708,185	£136	£91	1,633	1,250	67%	5.2	40.1
Apr 2021	Peak District National Park	27,258	20,831	57,287	42,745	£3,634,074	£174	£133	1,250	1,223	76%	3.6	60.6
Apr 2021	South Downs National Park	25,613	15,662	45,582	27,259	£3,098,152	£198	£121	1,358	1,292	61%	3.1	42.5
Apr 2022	Peak District National Park	40,919	29,375	84,476	61,080	£5,977,309	£203	£146	1,596	1,564	72%	3.4	70.9
Apr 2022	South Downs National Park	42,334	24,550	76,907	44,967	£5,176,188	£211	£122	1,879	1,832	58%	3.0	59.0
Apr 2023	Peak District National Park	51,474	36,708	107,675	76,999	£8,126,110	£221	£158	1,948	1,914	71%	3.4	68.8
Apr 2023	South Downs National Park	47,074	26,714	84,451	49,445	£5,908,006	£221	£126	2,093	2,049	57%	3.1	65.6
Apr 2024	Peak District National Park	60,692	39,079	132,155	85,868	£10,060,119	£257	£166	2,263	2,194	64%	3.5	61.4
Apr 2024	South Downs National Park	52,770	25,667	97,107	47,585	£5,763,291	£225	£109	2,284	2,180	49%	3.2	65.4
Apr 2025	Peak District National Park	63,708	47,122	142,276	105,261	£13,429,296	£285	£211	2,413	2,383	74%	3.3	62.5
Apr 2025	South Downs National Park	54,462	30,577	100,417	57,376	£7,315,833	£239	£134	2,388	2,337	56%	3.0	60.3

Source: AirDNA

