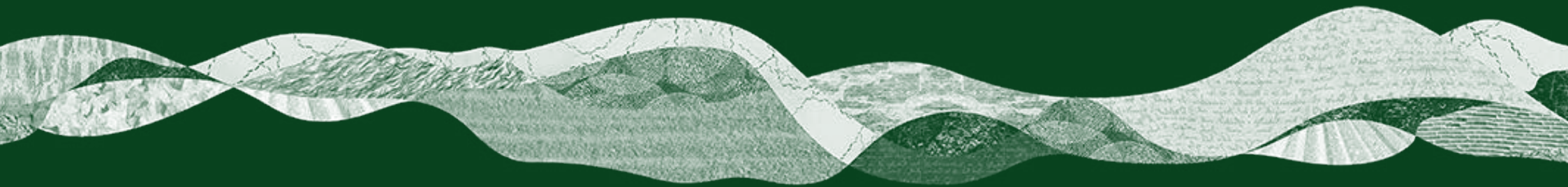


**SOUTH DOWNS
NATIONAL PARK**

Economic Profile 2025



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*Walking through apple blossom at Stanmer Park
Copyright: SDNPA*

Chair's Foreword



A thriving economy across the South Downs is integral to the success of this wonderful National Park and the people who live, work and visit here.

This is one of the biggest, and most diverse, rural

economies in the United Kingdom (UK) – bringing some £3.8bn Gross Value Added to our nation's economy.

It's also unique in terms of economic impact compared with other National Parks. Of all businesses in English National Parks, almost a third are in the South Downs, while just over 40 percent of all employment lies within these rolling green hills and its surrounds.

Of course, behind these interesting statistics are many amazing people – working day-to-day with determination and innovation across so many varied sectors, including professional services, manufacturing, land-based industries, tourism and the growing net-

zero sector. Some 90 percent of our businesses are micro, so it's often very small teams making a big impact.

The diversity of the South Downs economy is undoubtedly one of its great strengths and, amid challenging economic headwinds and the covid pandemic, its quiet resilience has shone through time and time again.

As our communities face an ever-changing climate and embrace the nature-based solutions that will unlock new doors for economic and social prosperity, it's clear businesses will be at the forefront of this journey.

As a stark report by the Green Finance Institute identified, the UK faces economic shrinkage – by some 4.7 percent within this decade – if we don't integrate nature into our growth strategy. Here in the South Downs, with its incredible green and blue infrastructure, we have a real opportunity to grow a nature-positive economy over the next few years.

It's hugely encouraging that Responsible Business continues to expand and I'm thrilled that 18 businesses have become B Corp in the South Downs National Park – more than any other National Park in the UK.

There's so much to celebrate here, as well as look forward to the new opportunities emerging across the business sector, particularly in relation to green finance.

This fascinating report offers a detailed and incredibly useful insight into the South Downs National Park's economic health and I hope you enjoy discovering more.

I think it robustly demonstrates that economic wellbeing and enhancing nature can, and should, work in tandem – and this is so encouraging for the National Park as we move forward.

Vanessa Rowlands
Chair of South Downs National Park Authority

Executive Summary of Findings



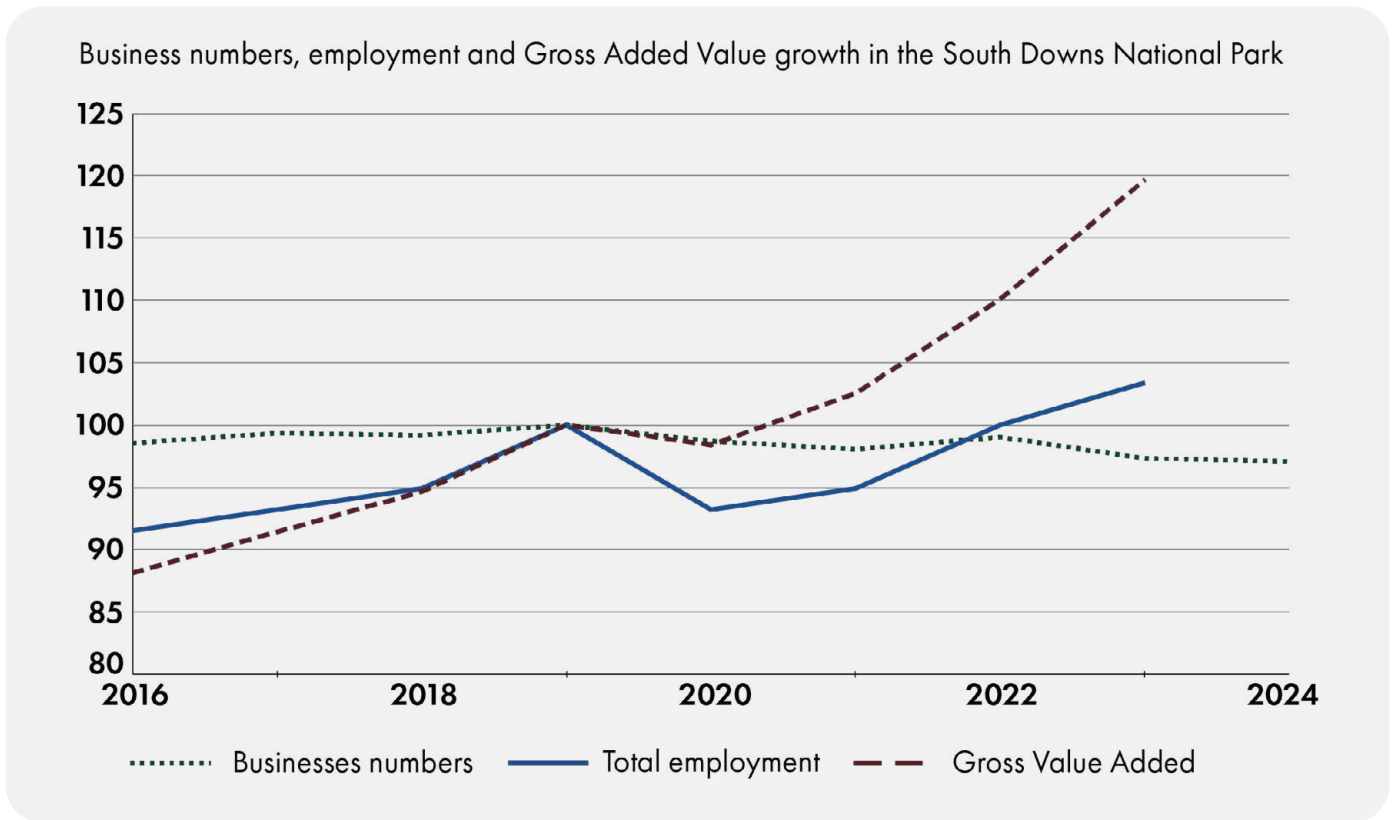
Executive Summary of Findings

The South Downs National Park in 2025 stands as an interesting model of how protected landscapes can balance environmental stewardship with economic dynamism.

Unlike many other National Parks in the UK, the South Downs is not reliant on a single dominant sector like agriculture or tourism. Instead, it boasts a diversified economy aligned with the wider South East, combining professional services, manufacturing, land-based industries, high-value tourism and an emerging net-zero sector. This economic variety provides a level of resilience that has insulated the National Park from many of the shocks seen elsewhere in the country over the past five years, particularly as a result of Brexit, the Covid-19 pandemic or the UK sharp rise in inflation and energy prices, largely as a result of global conflict.

Between 2020 and 2023, the South Downs National Park economy demonstrated notable steadiness, with overall employment growing by 10.9 percent – a rate exceeding that of the wider South East region

Figure 1: Change in total business counts, change in employment and total Gross Value Added. Rebased (index 2019 = 100)



(5.3 percent), indicating consolidation rather than contraction. While the overall number of businesses has fallen since before the pandemic, and has not grown since 2016, Gross Value Added growth

remains positive, not interrupted by the pandemic and showing the South Downs is as a productive place to do business as anywhere else in the region (figure 1).

50% growth

in manufacturing employment
between 2016 and 2023

**32% of
businesses**

in all English National Parks
are in the South Downs



£3.84 billion

Gross Value Added for the
National Park-wide economy



5,980

businesses registered in the
South Downs National Park

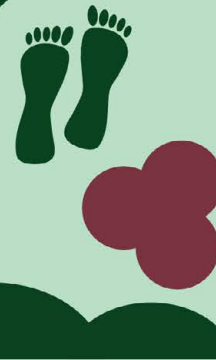
18

certified B Corps

Carbon footprint of tourism

748,000 tonnes

of CO2e annually are
attributable to visitors.



Accommodation and
Food sector is the
biggest employer in the
South Downs providing

**7,000
jobs**

98.5%

of businesses in the South
Downs are micro or small
businesses (< 50 employees)



1,200

professional and scientific businesses



£413.93 million

visitor economy, direct
annual spend

- **Gross Value Added** for the National Park-wide economy is estimated at **£3.84 billion** (2023 figures), and has risen 16 percent 2019-2023. Productivity (Gross Value Added per head) has also risen by 8.5 percent since 2019, outstripping the South East average.
- **Professional and scientific services** are the most numerous business type, rather than farming or tourism. This challenges some assumptions about rural economic life and reflects the National Park's proximity to knowledge hubs, universities and international hubs such as Gatwick Airport, Newhaven and Shoreham.
- **The total number of employees** in the South Downs National Park was 61,000 in 2023. This was the first year it rose above the pre-Covid-19 high of 59,000 in 2019. This shows a full recovery from the 2020 low of 55,000.
- **Land-based sectors** (including farming, forestry, wine, and fishing) deliver an estimated **£67.9 million in direct Gross Value Added**.
- **The visitor economy** is responsible for **£413.93 million in direct annual spend**, rising to **£553.6 million** including wider economic impact, supported by **19.2 million visitors per year**. But crucially, **26 percent of tourism economic impact comes from visitors who stay longer than a day, while only accounting for 3 percent of visitors**.
- The National Park remains a high quality employment centre. **Manufacturing employment grew by 50 percent between 2016 and 2023**, led by sub-sectors such as sustainable food and drink and consumer chemical production. Similarly, the public sector – especially education and health – remains a major anchor for jobs across the National Park's towns and villages.
- The South Downs National Park has become a testbed for **values-driven enterprise**. It now hosts at least 18 certified B Corps, the highest concentration of any UK National Park. This includes not just organic food producers, but also consultancies, designers, and social enterprises.
- **Resilience post-Covid** was higher than expected. Towns like Petersfield and Lewes saw retail footfall bounce back to pre-pandemic levels by 2023, with vacancy rates remaining well below the national average throughout 2020-2024.
- The **carbon footprint of tourism** is significant. An estimated **748,000 tonnes of CO2e annually** are attributable to visitors, over **60 percent of which comes from travel to and from the National Park**. This makes a modal shift in transport a priority for future strategies.

The role of the National Park as custodian and enabler

The South Downs National Park Authority (SDNPA) faces a dual mandate: to protect and enhance the natural environment while fostering economic wellbeing. This report makes clear that this is not a contradiction. A diverse economy grounded in low-impact growth, quality employment, and environmental value aligns with the National Park's long-term purpose.

The South Downs National Park Authority has enabled positive economic outcomes through planning, partnership-building and funding strategy – whether supporting farming transition through the Farming in Protected Landscapes (FiPL) scheme, or unlocking community energy innovation and sustainable tourism through Green Recovery Challenge Fund initiatives.

Looking ahead, the National Park's role as both custodian and enabler is vital to ensure prosperity without compromising landscape quality or biodiversity. The unique combination of productive land, high-quality market towns, green infrastructure, and a resilient business base positions the South Downs as a national leader in sustainable rural growth.

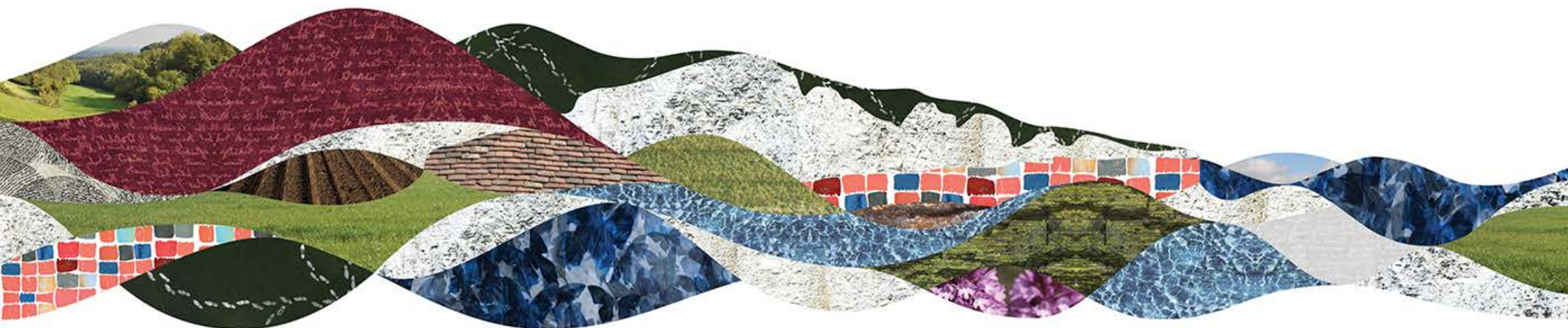


Cycling on the Downs Link and South Downs Way near the River Adur.

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Introduction





Introduction

The South Downs National Park is the most populous of the UK's National Parks, with 117,000 residents and 2.2 million people living within 5 kilometres of its boundary (1). It plays a distinctive role as a rural economic locale. One shaped by proximity to London and the coastal cities, and by its own richly varied geography and enterprise base.

It's a place where world-class landscapes meet thousands of small businesses, vibrant towns, cultural

heritage, and emerging green industries. This profile has been commissioned by the South Downs National Park Authority (SDNPA) to offer a clear and up-to-date picture of how the National Park's economy is changing and where the opportunities lie.

This report presents the 2025 Economic Profile of the South Downs National Park, updating the evidence base last reviewed in 2018 and 2020. This profile brings together fresh data and local insight to help

understand the dynamics shaping towns, villages, and rural enterprises. It looks at business sectors, employment trends, skills and demographics, as well as shifts driven by national and global change: from the effects Covid-19 to the growing need for a successful green economy.

This report offers a detailed picture of the South Downs National Park's economic health. Using data primarily from the Office for National Statistics, supported by

sector specific reports and publications from local authorities. It provides comparative analysis with neighbouring counties, the South East region and other English National Parks, as well as the Lake District – identified as the most similar to the South Downs in visitor numbers, management structures and pressures around tourism, land use, and conservation.

It includes sector-specific deep-dives into key sectors, including the visitor economy, land-based industries, manufacturing and high street retail. The report also integrates carbon data and green economy indicators for the first time, in recognition of the National Park's pivotal role in facilitating low-impact prosperity and net zero ambitions. These sectors have been selected as they are the ones that the South Downs National Park Authority is most active and aligned with and where it considers it is able to have the most impact.

For a full list of sources and methodology, see Appendix 1.

This report has been prepared by local economics and social innovation agency, always possible, in

collaboration with, or with the helpful support of, the South Downs National Park Authority, East Hampshire District Council, Experience Sussex, Chichester District Council, data analytics company Alirity, and other district and borough council economic development staff.

This report is about understanding how to sustain the economic life of the National Park in ways that protect its landscapes, support its communities, and unlock its potential. It hopefully serves as a useful foundation for decision-making leading to greater rural prosperity.

To support this, the profile is presented in two parts:

- Part 1 (this report) presenting:
 - The main indicators and standout insight about the economy in 2025
 - The sector deep dives and green economy update
 - Conclusions and recommendations
- Part 2 (the appendix) provides a dataset of updated economic indicators and time-series analysis.



Handlebar cafe at St Catherine's Hill.

Copyright: SDNPA

The South Downs Economy in 2025



The South Downs Economy in 2025

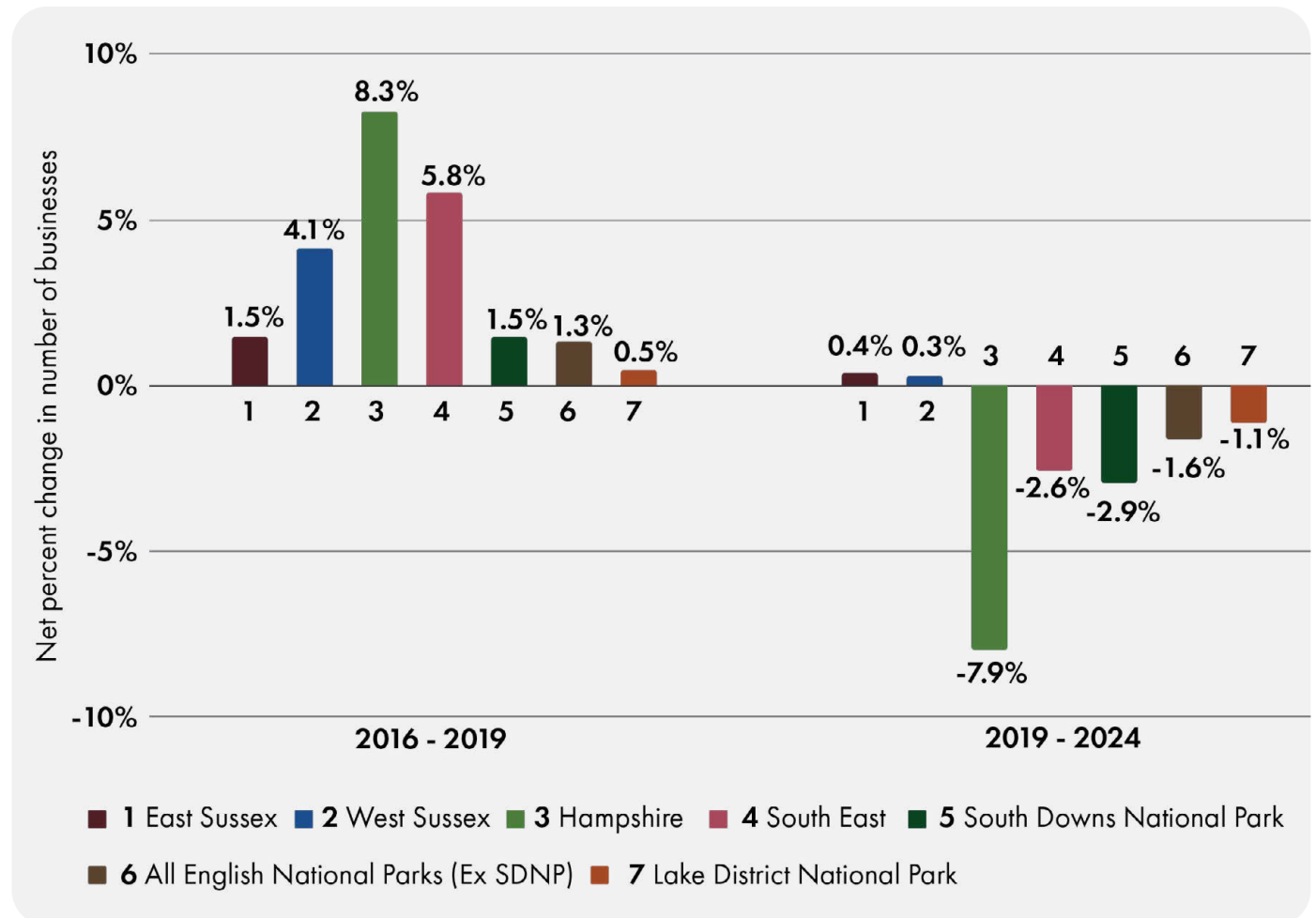
A National Park That Works Differently

In 2025, the South Downs National Park continues to defy assumptions about rural economies. It is home to a diverse and resilient business community. One that mirrors the dynamism of the South East while staying deeply rooted in place. Atypical for a National Park, the South Downs National Park's economy is not dominated by a single sector. It is instead composed of professional services, land-based production, creative industries, and high-value tourism. This diversity is its strength.

The business population:

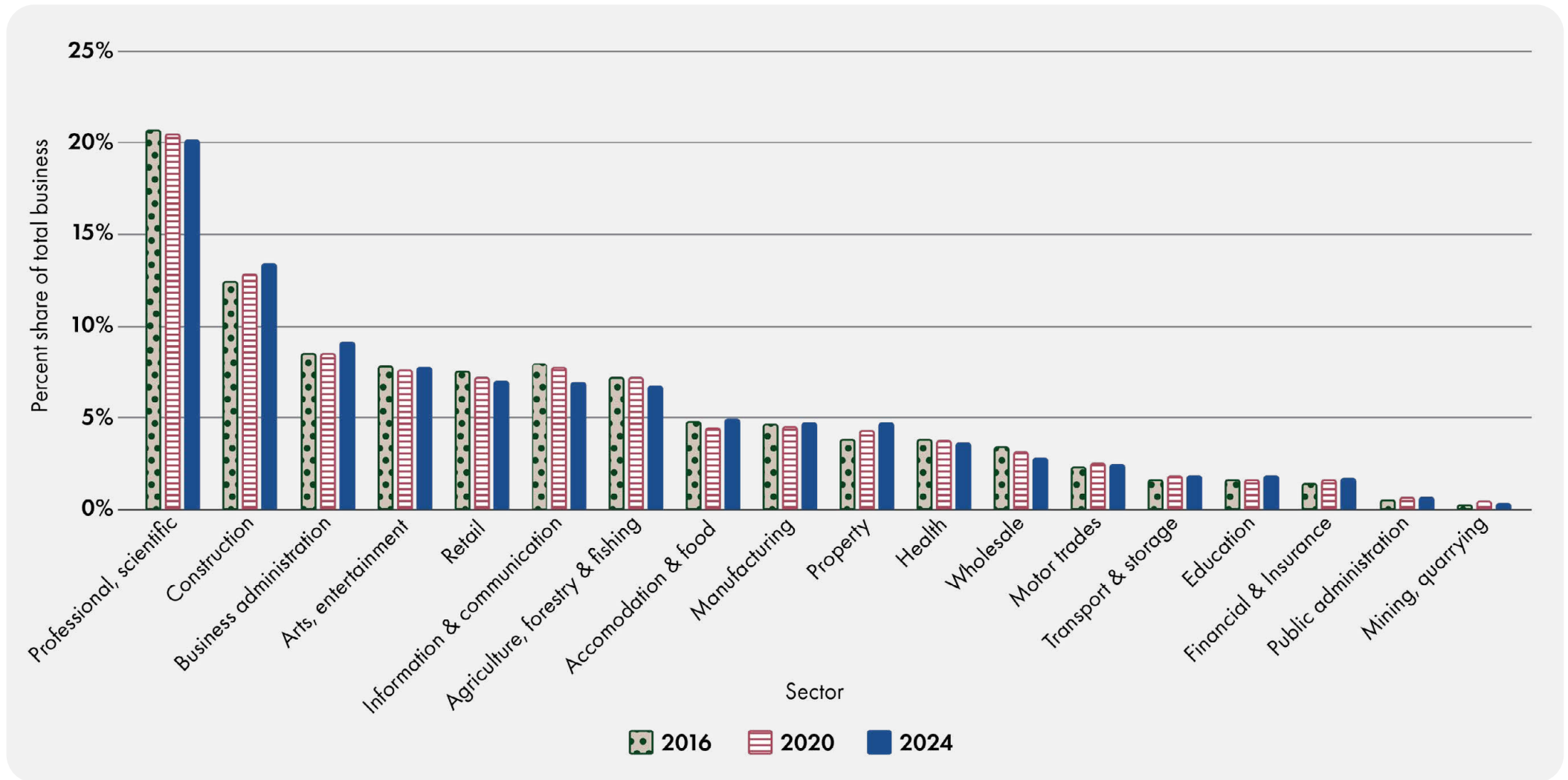
The business population of the South Downs National Park was 5,980 in 2024 (2). This is down -1.5 percent since 2016 and -2.9 percent since 2019 (3) when numbers peaked at 6160. Business growth has not matched the surrounding local authorities over the long term. Decline in business numbers are similar to those seen across the South East, but a little higher than other National Park comparators (figure 2).

Figure 2: Change in the total number of businesses in the South Downs National Park and comparator areas 2016-2019 & 2019-2024



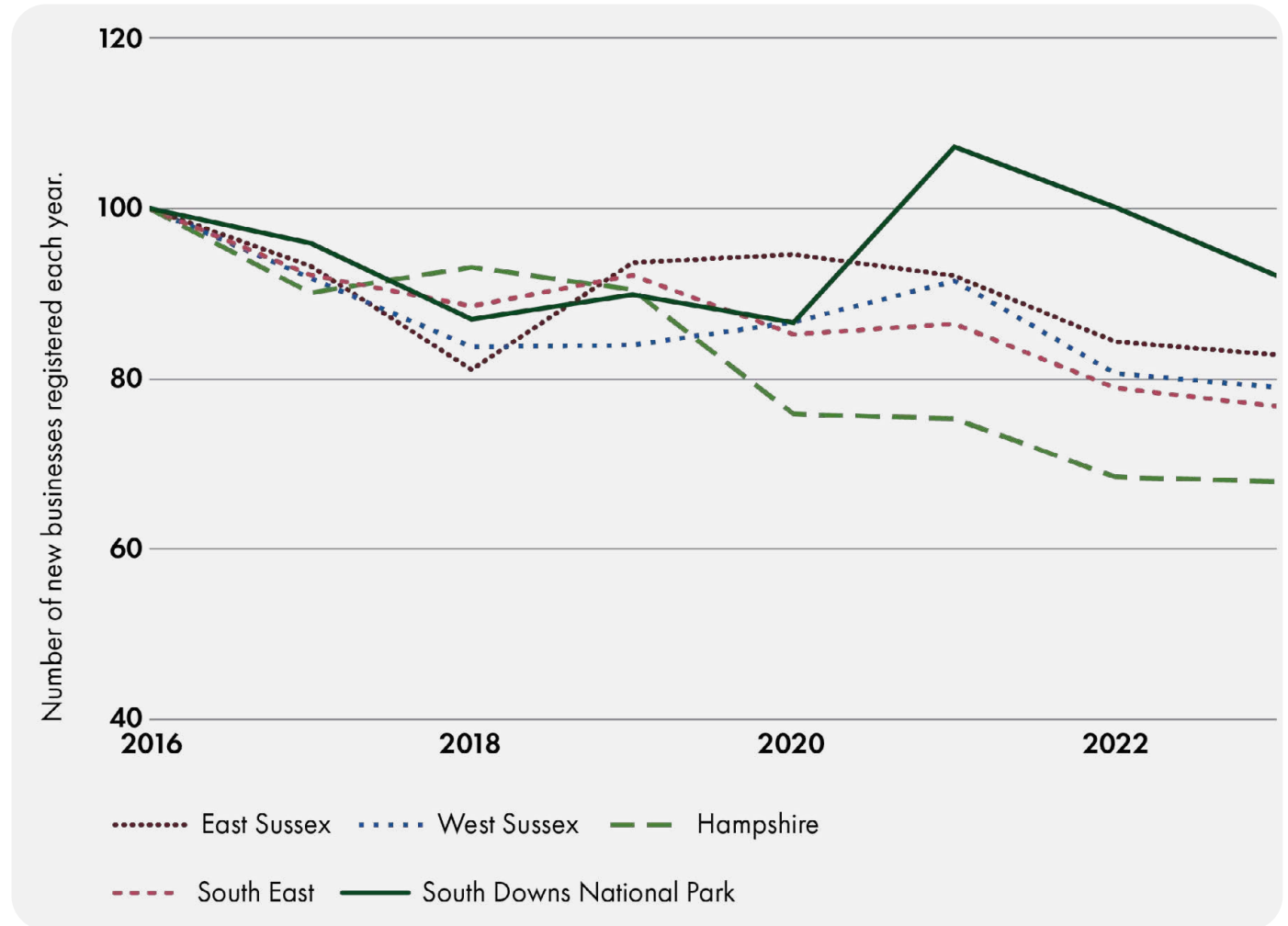
As figure 3 shows, the decline in business numbers is spread across sectors, with no specific part of the economy seeing a sharp contraction in business numbers.

Figure 3: Sector share of total businesses in The South Downs National Park 2016, 2020 and 2024



It's a challenging time for start-ups, but the National Park remains more hospitable to entrepreneurs than elsewhere. Since 2016, new business formation in the South Downs National Park has followed a steady downward trend. The number of new businesses fell by 8 percent. This is less than the drop seen in Hampshire (-32 percent), West Sussex (-21 percent), East Sussex (-17 percent) and the South East (-23 percent). In 2021, amid the shifts in working patterns prompted by Covid-19, The South Downs saw a spike in new business formation. This suggests the South Downs offered a comparatively supportive environment for entrepreneurs looking to start up in a rural, high-quality setting during the Covid-19 upheavals (figure 4).

Figure 4: Number of new businesses registered annually in the South Downs National Park and comparator areas 2016-2024. Rebased (index 2016 = 100).

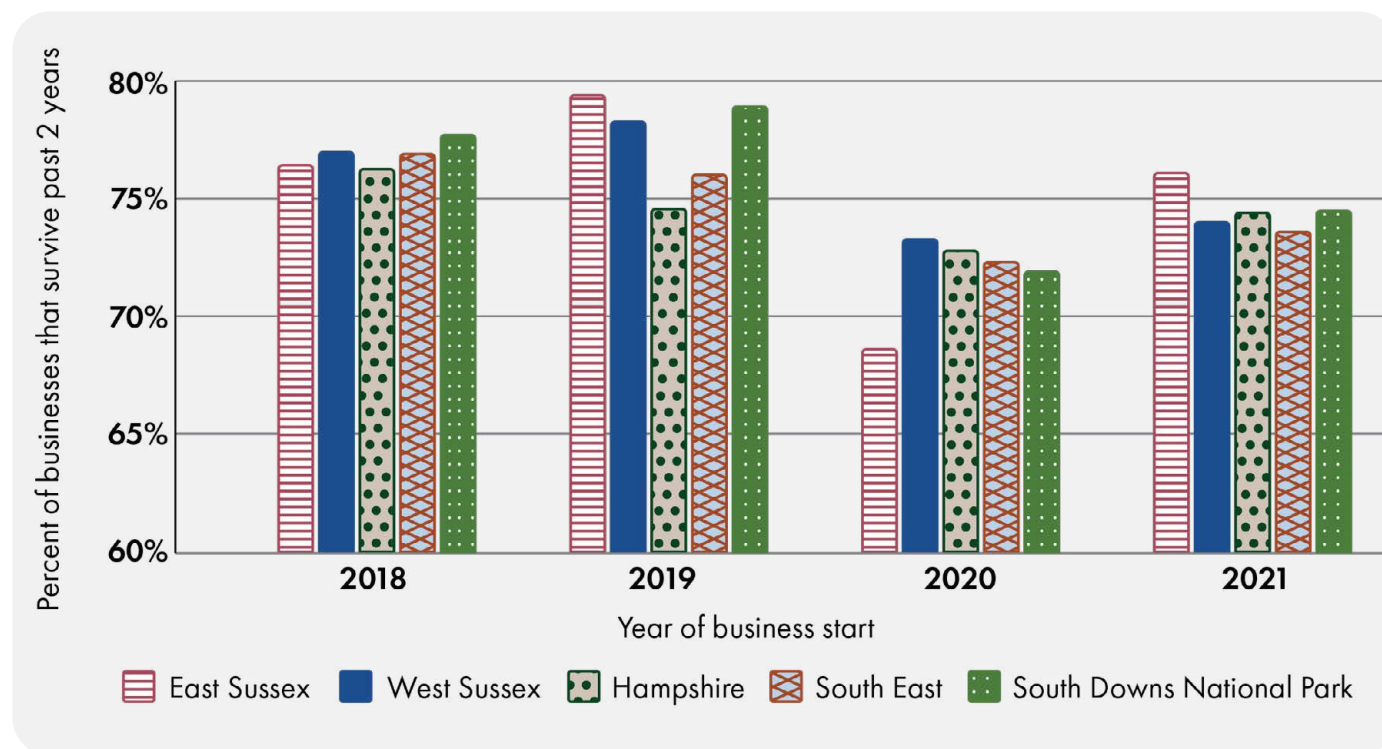


Man serving in shop. Copyright: SDNPA and Mischa Haller

Once businesses establish themselves within the National Park, their prospects improve notably. Although two-year survival rates have declined everywhere since Covid, the South Downs compares well with neighbouring regions. Of businesses founded in 2019, 78.9 percent survived for at least two years. This fell to 71.9 percent for those started in 2020, before rising to 74.5 percent in 2021, the most recent year for which data is available. While this is slightly below East Sussex’s 76.1 percent survival rate in 2021, it is marginally ahead of all other comparator areas (figure 5). So while the outlook is of fewer entrepreneurs looking to take the initial plunge, those who do find the local environment conducive to longevity (4).

A potential risk, however, is that fewer new businesses can lead to decreased competition and innovation, as established firms have less pressure to adapt or improve, potentially stifling creativity and growth over time. A local economy reliant on fewer, larger, or long-established businesses may also be vulnerable if one or two significant employers fail or relocate, causing disproportionate impact on local employment and economic stability – but there is no evidence that this is an immediate risk.

Figure 5: Percentage of businesses that survive past 2 years by year of registration for South Downs National Park and comparator areas



A diversified economy

The South Downs National Park has a broader spread of enterprises in a range of service sectors, unlike other national parks that are weighted towards land-based and tourism. As figure 6 shows, The South Downs much more closely matches the South East, unlike other national parks where agriculture and tourism dominate. In the Lake District, for example,

the two sectors agriculture, forestry and fishing and accommodation and food services account for 41 percent of businesses (5). In the South Downs it is 12 percent. Land-based industries, professional services, tourism, and manufacturing each contribute to business numbers and employment, with no single sector comprising more than 20.1 percent of businesses.

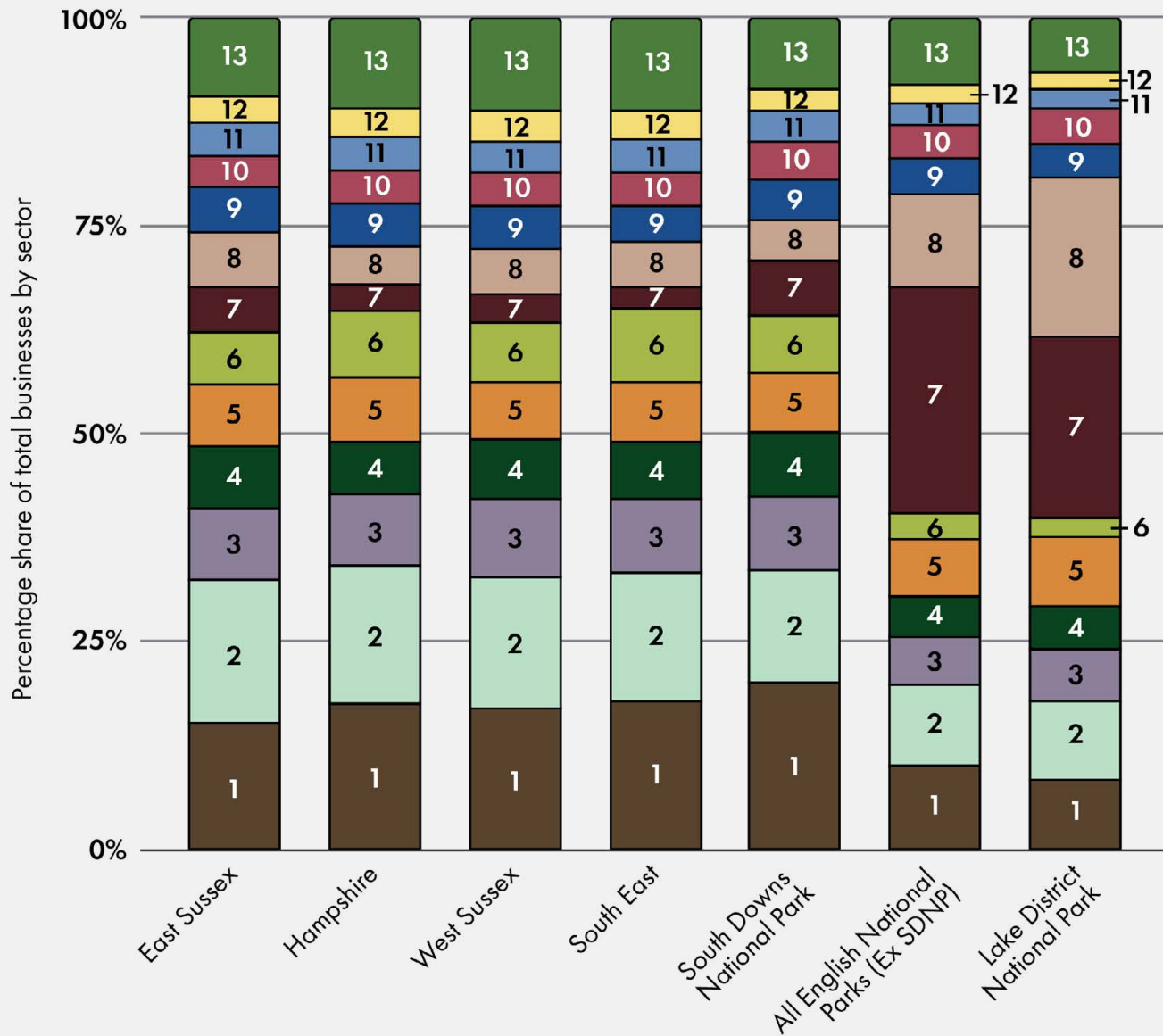


Figure 6: Distribution of sectors by percentage share of businesses in the South Downs National Park and comparators in 2024. Ordered by most common in the South Downs National Park.

- 1 Professional, scientific & technical
- 2 Construction
- 3 Business administration
- 4 Arts, entertainment & recreation
- 5 Retail
- 6 Information & communication
- 7 Agriculture, forestry & fishing
- 8 Accommodation & food services
- 9 Manufacturing
- 10 Property
- 11 Health
- 12 Wholesale
- 13 Other

Professional, scientific and technical services are the most numerous businesses, with around 1,200 mostly micro-sized firms making up 20.1 percent of the business base (6). This is the highest proportion in the region (7).

Responsible business is a growing trend. Between 2020 and 2024, at least 18 businesses in the National Park became B Corp certified, or recertified, spanning sectors from sustainable manufacturing to hospitality, consulting, and creative services (8). This is the highest number in any UK national park. Early adopters like Jude’s and Wild Nutrition focus on health and food products, but the profile has since broadened to include neurodiversity services, environmental consultancy, and design agencies. Over 60 percent are service-based firms, with a strong cluster in the Lewes and Eastbourne districts, suggesting an emerging local ecosystem of values-led enterprise.

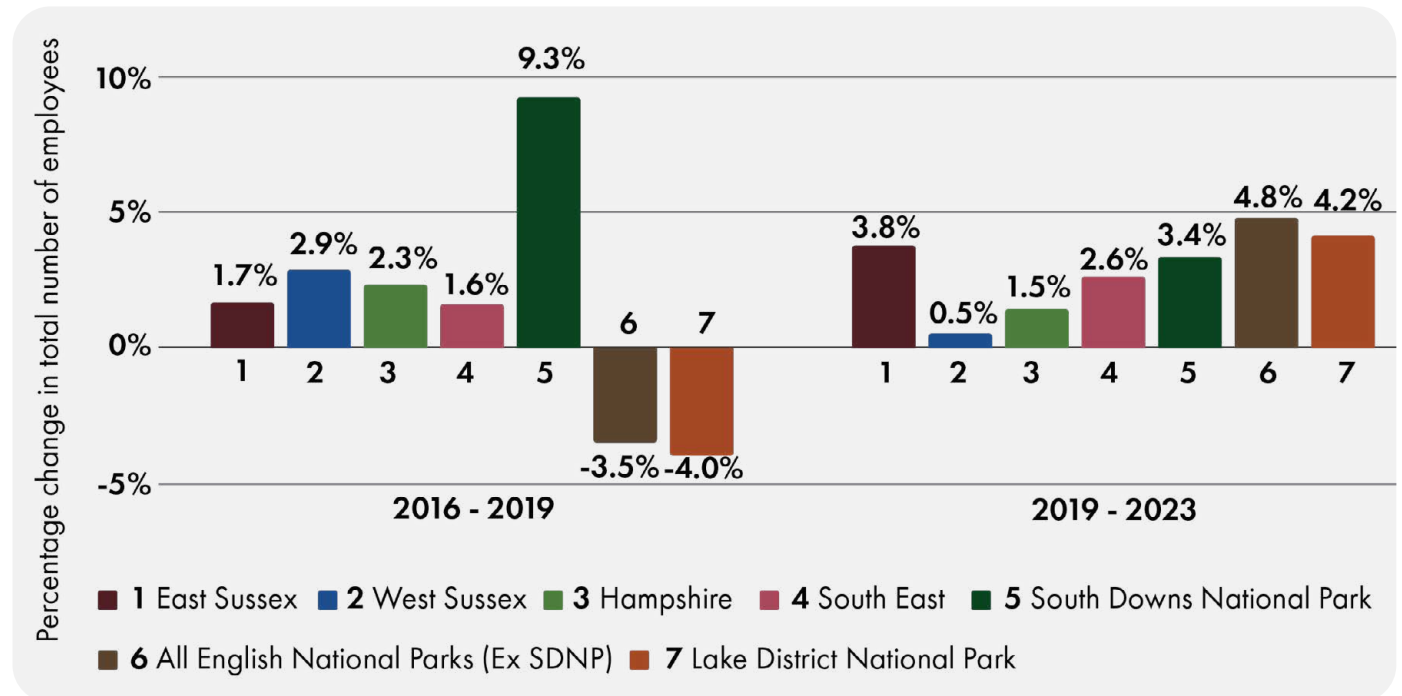
B Corp accreditation is currently the highest global business standard for environment and social impact for business (9).

Employment

While the national narrative has been one of postpandemic volatility, South Downs employment tells a subtler story. **Employee numbers grew from 54,000 in 2016 to 61,000 in 2023.** This is a growth rate of 13 percent, outpacing regional averages and a much more volatile trend seen in other National Parks. As figure 7 shows, most of this growth occurred

between 2016 and 2019, when employment rose by 9.3%, well ahead of neighbouring local authorities, which grew by between 1.7% and 2.9%, and in contrast to other National Parks, all of which saw declines. From 2019 to 2023, growth in the South Downs slowed to 3.4%, bringing it much closer to comparator areas.

Figure 7: Change in total employees in the South Downs National Park and comparator areas 2016-2019 and 2019-2023



As table 1 shows, performance across sectors over 2016-2023 shows a mixed picture of long term growth and post Covid contraction or recovery (10).

Table 1: Number of employees by sector and change in employees 2016, 2019 and 2020.

Industry	Number of Employees 2016	Number of Employees 2019	Number of Employees 2023	Growth 2016-2019	Growth 2019-2023	Growth 2016-2023
Accommodation & food services	6,000	7,000	7,000	16.7%	0.0%	16.7%
Manufacturing	4,000	5,000	6,000	25.0%	20.0%	50.0%
Education	5,000	5,000	6,000	0.0%	20.0%	20.0%
Health	5,000	6,000	6,000	20.0%	0.0%	20.0%
Retail	4,500	5,000	5,000	11.1%	0.0%	11.1%
Professional, scientific & technical	4,500	5,000	5,000	11.1%	0.0%	11.1%
Arts, entertainment, recreation & other services	4,500	4,000	5,000	-11.1%	25.0%	11.1%
Public administration & defence	3,000	4,500	4,500	50.0%	0.0%	50.0%
Business administration & support services	4,000	4,000	4,000	0.0%	0.0%	0.0%
Construction	3,000	3,000	3,000	0.0%	0.0%	0.0%
Wholesale	1,750	2,000	2,000	14.3%	0.0%	14.3%
Information & communication	2,000	2,000	1,750	0.0%	-12.5%	-12.5%
Property	2,500	1,500	1,500	-40.0%	0.0%	-40.0%
Motor trades	900	1,250	1,000	38.9%	-20.0%	11.1%
Transport & storage (inc postal)	1,000	700	800	-30.0%	14.3%	-20.0%
Financial & insurance	1,000	900	800	-10.0%	-11.1%	-20.0%
Mining, quarrying & utilities	450	600	400	33.3%	-33.3%	-11.1%
Agriculture, forestry & fishing (11)	175	350	350	100.0%	0.0%	100.0%

Employment growth since 2019 is only seen in Manufacturing, Education, Arts, entertainment and recreation and transport and storage. There have not been contractions in any of the top 11 sectors by employment since 2019, with shrinking sectors being Information and communication, Motor trades, financial and insurance and mining, quarrying and utilities.

Where is the employment growth?

- **Manufacturing** +50 percent between 2016-2023, consistent gains, especially in food, drink and skincare
- **Public services** remain a core employment pillar of stability. **Public administration** up 50 percent 2016-2019, **Health** up 20 percent and **Education** up 20 percent since 2019.
- **Arts, entertainment & recreation** up 25 percent since 2019 shows leisure jobs growing in a difficult period.

Stable sectors

- **Wholesale, retail, and professional services** each posted 11 percent to 14 percent growth since 2016. These sectors remained flat post-2019 but are stable parts of the economic mix.

- **Business support services** and **construction** showed no net growth but held steady over the past seven years.

More volatile sectors

- **Information & communication** down 12.5 percent post-2019, despite stability before. This may signal vulnerabilities linked to broader market pressures.
- **Financial & insurance services** services -20 percent since 2016, shrinking before and after Covid.
- **Mining, quarrying & utilities** roles have fallen one third since 2019, marking a contraction from a (small) sector that had shown growth pre Covid.

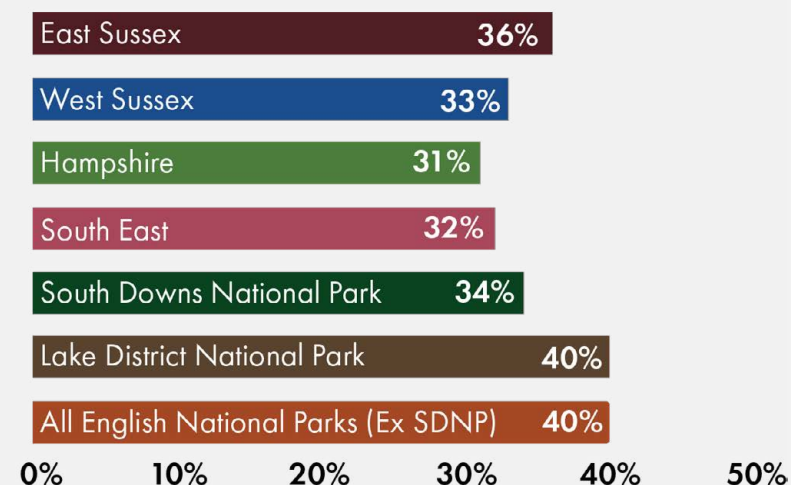
South Downs National Park towns as regional service hubs. 27.5 percent of jobs are in health, education, or public administration; compared with 17.9 percent in all other National Parks.

Manufacturing plays a meaningful role, with steady job numbers driven by both major firms and a long tail of smaller, craft-based producers.

Part-time employment is lower than other National parks and closer to South East norms (figure 8). This can be an indicator suggesting greater wage resilience and economic stability.

Figure 8: Part time employees as a percentage of all employees for South Downs National Park and comparator areas

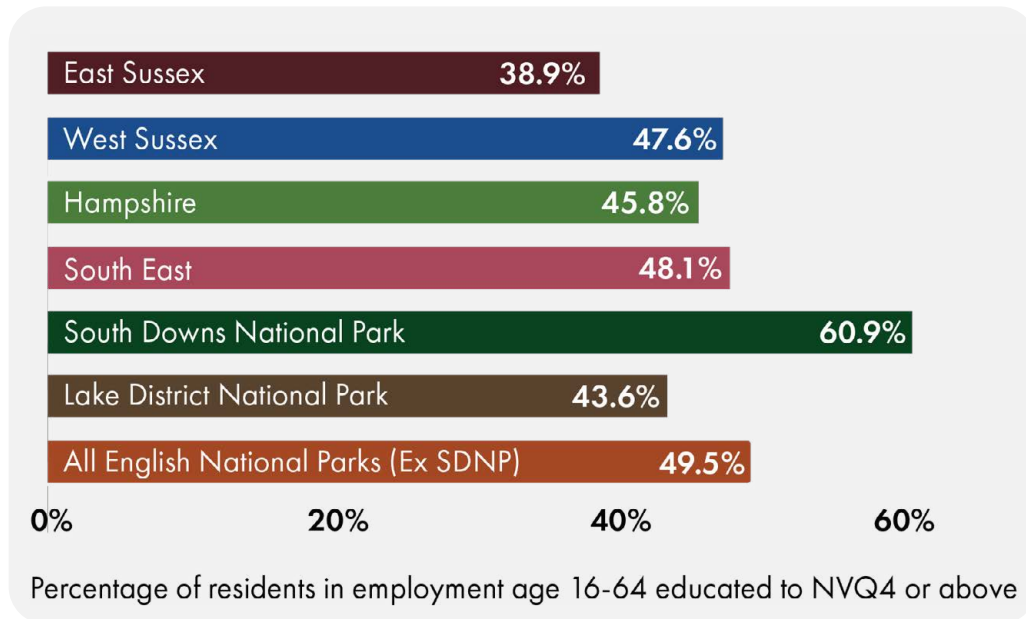
Part time employees as a percentage of all employees



Skills, productivity and the knowledge economy

The National Park boasts one of the most highly educated populations in the country. 60.9 percent of residents hold Level 4+ qualifications. Far above the South East average (48.1 percent) and other National Parks (49.5 percent) (12). See figure 9.

Figure 9: Percentage of South Downs National Park residents in employment, aged 16-64 with NVQ4+ qualification, 2024



This educational strength underpins a flourishing knowledge economy (KE).

Legal, design, and consultancy firms appear well-rooted, echoing a wider trend across National Parks as supportive environments for specialist service businesses.

The South Downs National Park leads all National Parks in the knowledge economy, with 1,840 knowledge economy enterprises compared with 2,075 across all other National Parks combined. As Figure 10 shows, it also hosts 13,360 knowledge economy jobs, almost matching the total for all other parks combined (14,520 jobs) (13).

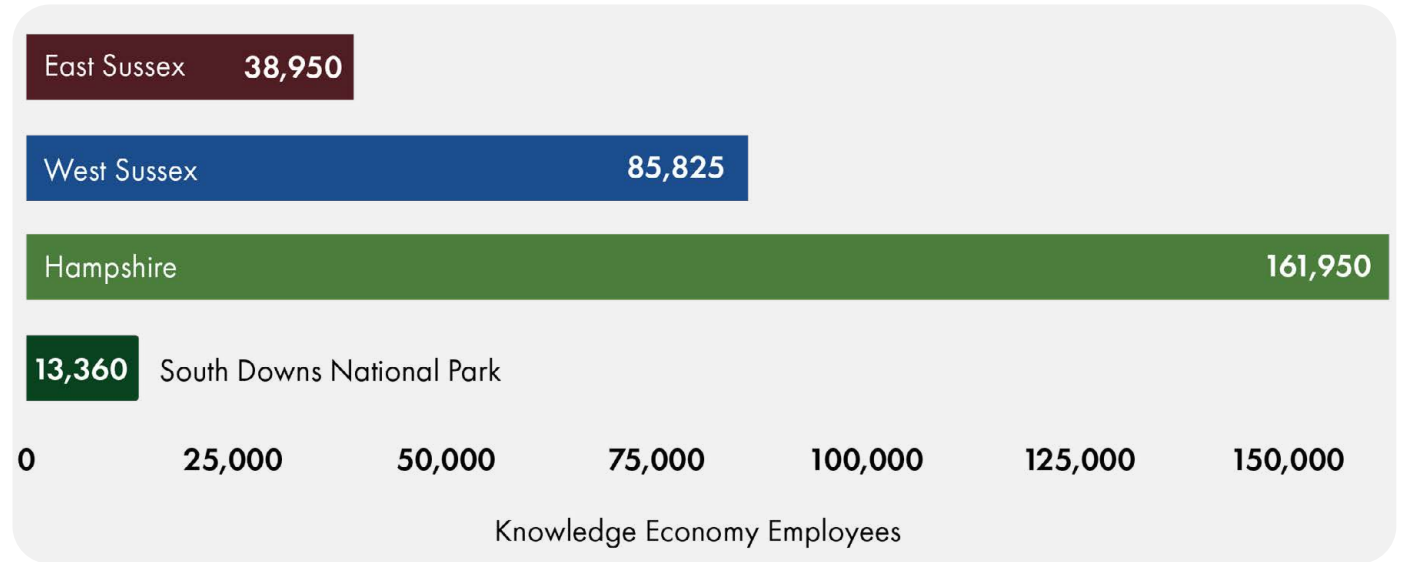
Figure 10: Total number of Knowledge Economy jobs in the South Downs National Park and English National Park comparators



The National Park punches above its weight locally too. With just 22 percent of the population, South Downs National Park (13,360) hosts a third as many knowledge economy jobs as East Sussex (38,950) and more than you'd expect compared to West Sussex (85,825) and Hampshire (161,950) (figure 11).

Decline, but slower: knowledge economy job numbers as a proportion of all employment have fallen everywhere since 2016, but the South Downs National Park's has actually grown 1.0 percent between 2019 and 2023, compared with contractions of -1.0 percent in Hampshire, -0.4 percent in West Sussex and -0.8 percent in East Sussex.

Figure 11: Total number of Knowledge Economy jobs in the South Downs National Park and local authority comparators 2023



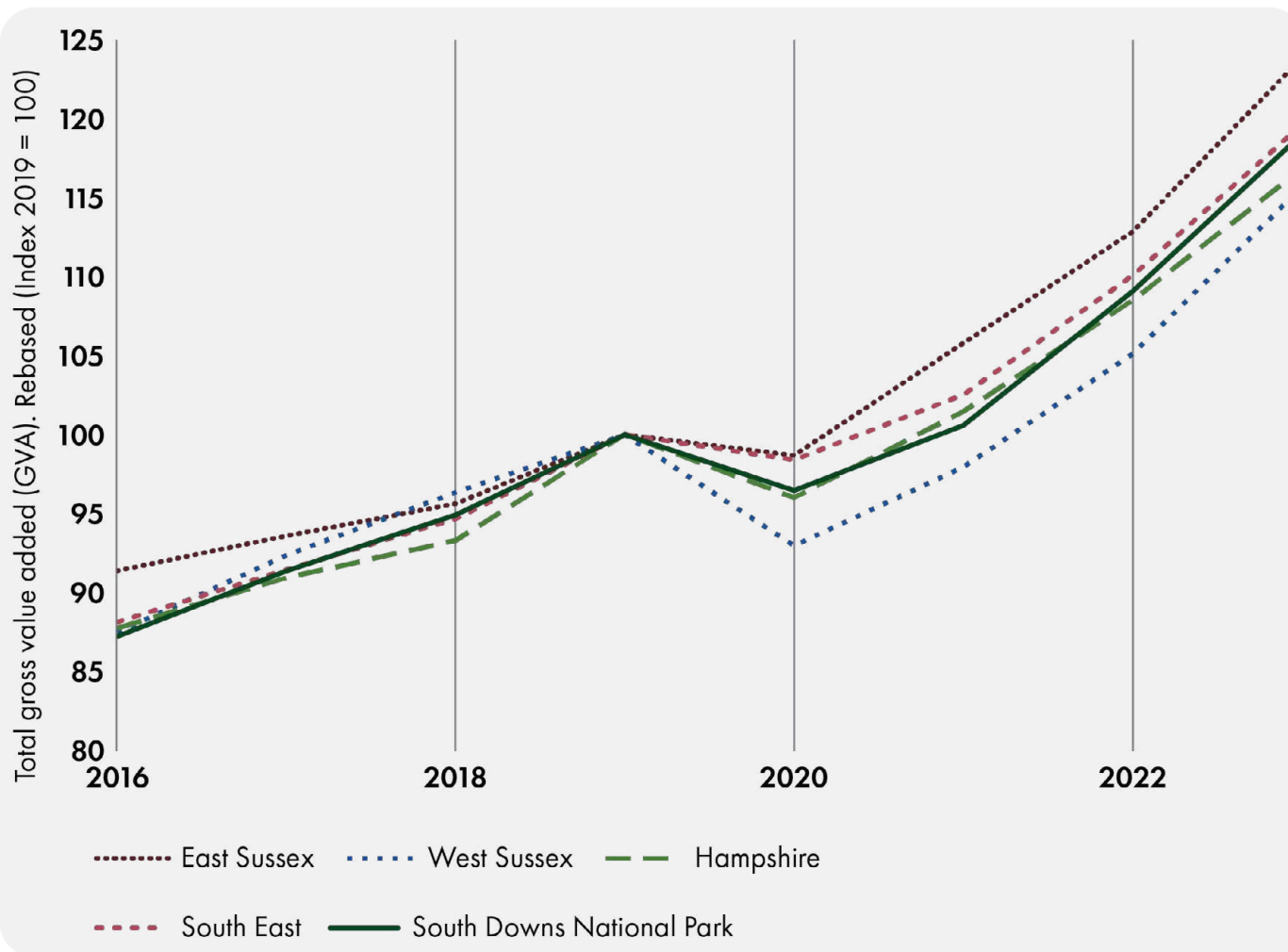
Seven Sisters Way South Downs. Copyright: SDNPA

Figure 12: Growth of total Gross Value Added (balanced), current prices, pounds million rebased (index 2019 = 100)

Productivity is also on the rise. The South Downs National Park is mid-pack of surrounding areas when it comes to absolute Gross Value Added growth. Rising 19.1 percent over the period 2019 to 2023 from £3.22 billion to £3.84 billion. This is a higher rate of

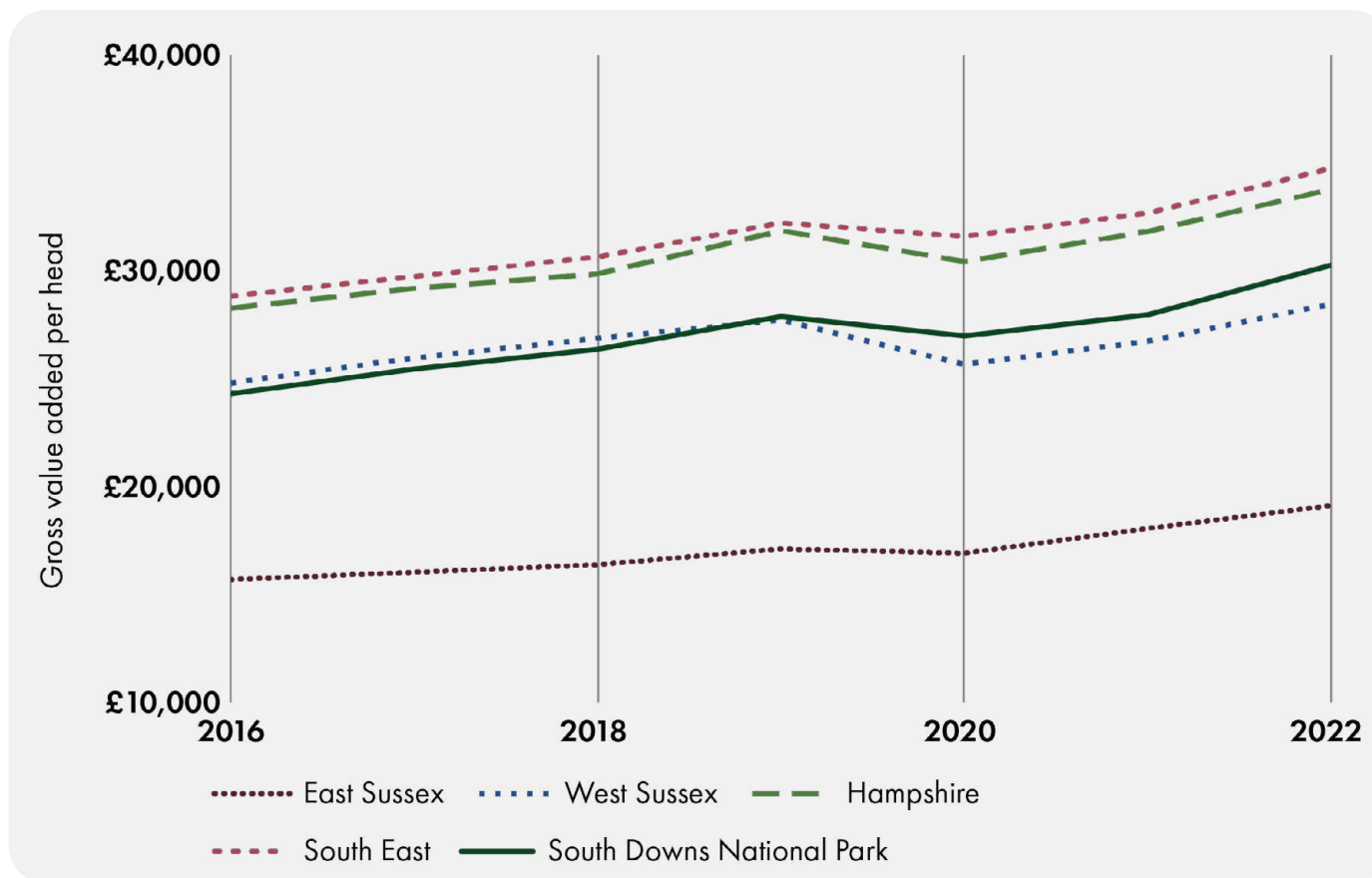
increase than West Sussex (15.7 percent Gross Value Added growth) and Hampshire (16.9 percent growth); a touch behind the South East region (19.7 percent) but lower than East Sussex (23.9 percent) (figure 12).

It is, however, closing the Gross Value Added per head gap to Hampshire and The South East regions, albeit slowly. Gross Value Added per head in the South Downs National Park increased by 8.5 percent from 2019-2022, ahead of the South East average of 7.8 percent (14) (figure 13).



Stanmer nursery. Copyright: SDNPA and Mischa Haller

Figure 13: Growth of total Gross Value Added per head (balanced), current prices, pounds million rebased (index 2019 = 100). Population from Office for National Statistics (ONS) annual population survey



The sectoral Gross Value Added breakdown for the South Downs National Park shows the greatest similarity with East Sussex, rather than with West Sussex or Hampshire (Figure 14). This likely reflects a more comparable rural-urban geography, with fewer

large urban centres and more dispersed economic activity. Comparing the sector share of Gross Value Added to the share of business numbers (Figure 15), there is a notable divergence in the contribution of the professional, scientific and technical services

sector. Despite being the largest sector by number of businesses within the South Downs National Park, it contributes a smaller share of total Gross Value Added compared to Hampshire and the South East overall. This suggests that while the National Park supports a high number of micro and small professional service firms, these are typically lower in turnover than their urban counterparts. In contrast, Hampshire and South East urban clusters may benefit from higher-value firms that agglomerate in larger centres, gaining productivity advantages from proximity and talent sharing. This is likely also reflected in the much larger contributions of the financial and insurance sector to those areas Gross Value Added.

As seen in figure 15, accommodation and food services, agriculture, and arts and recreation account for 4.9 percent, 6.7 percent, and 7.7 percent of all businesses respectively, yet contribute only 3.2 percent, 1.8 percent, and 1.7 percent of Gross Value Added, again suggesting these other major sectors of the South Downs Economy are predominantly low-margin, small-scale operations. Manufacturing shows itself to be productive in Gross Value Added terms, capturing 7.2 percent of Gross Value Added from a 4.7 percent share of businesses.

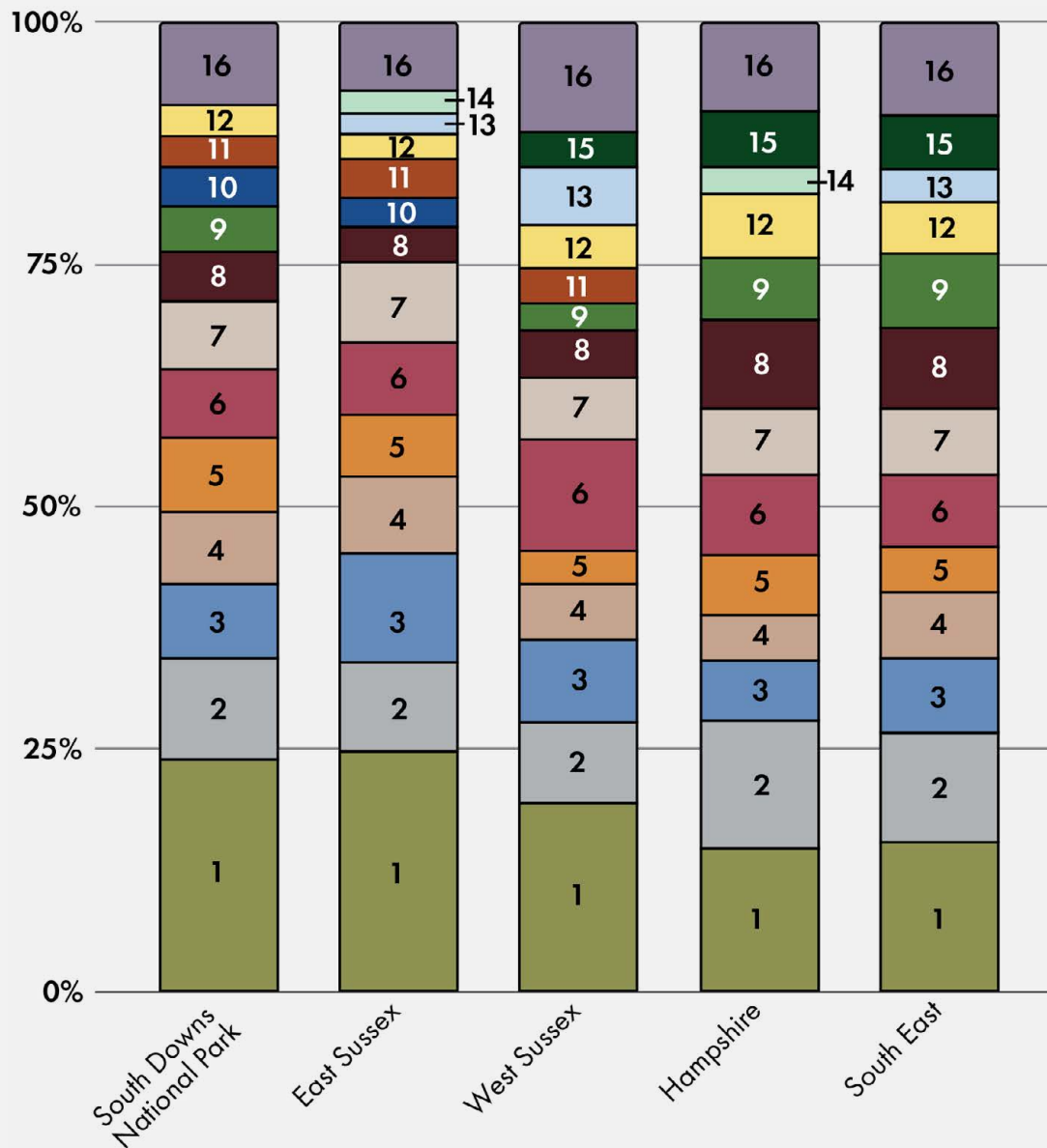
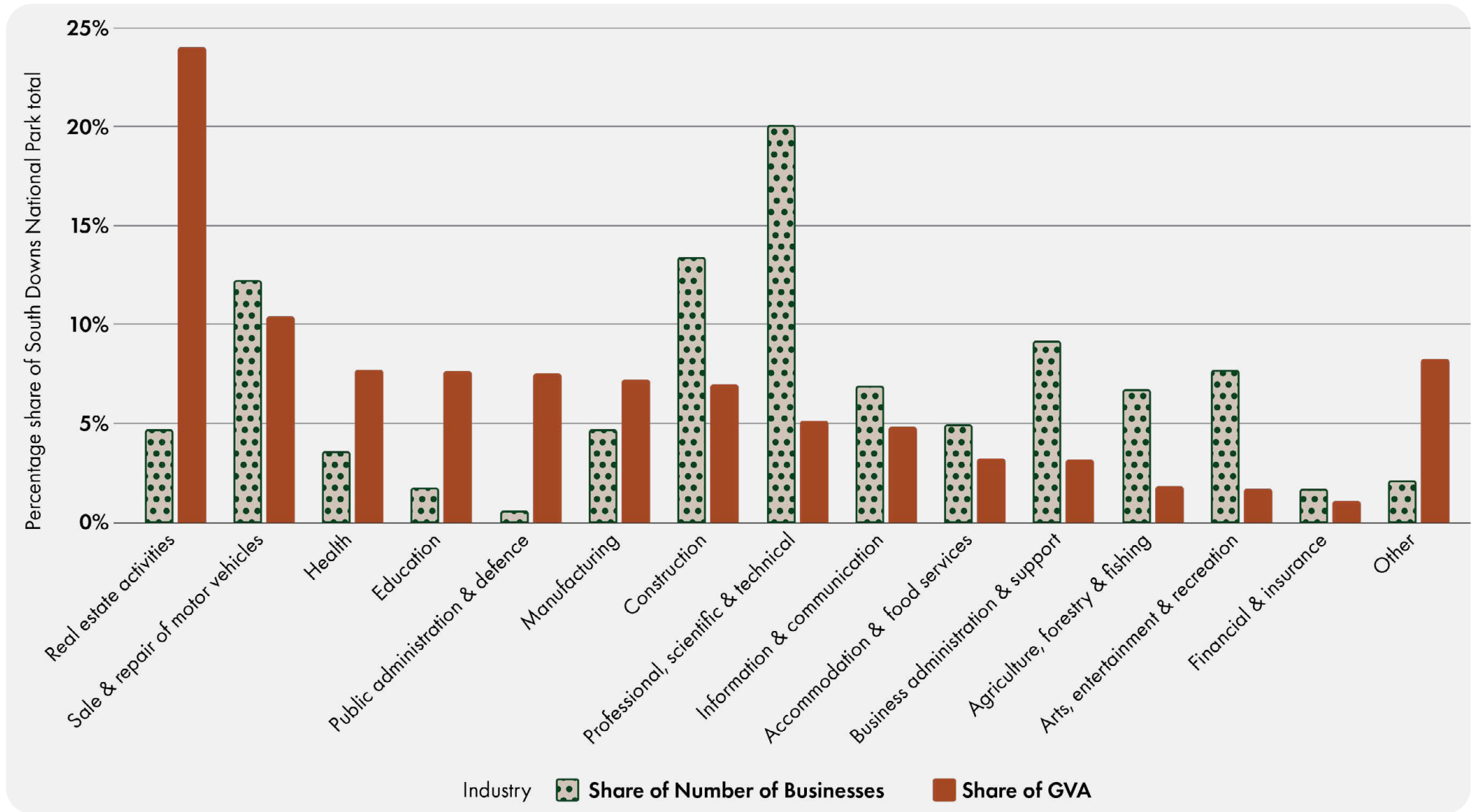


Figure 14: Share of Gross Value Added by sector for the South Downs National Park and comparator local authority areas. Current price estimates, pounds million.

- 1 Real estate activities
- 2 Motor vehicle trades
- 3 Human health and social
- 4 Education
- 5 Public administration and defence
- 6 Manufacturing
- 7 Construction
- 8 Professional, scientific and technical
- 9 Information and communication
- 10 Electricity, gas, water; and waste
- 11 Accommodation and food
- 12 Administrative and support services
- 13 Transportation and storage
- 14 Other service activities
- 15 Financial and insurance activities
- 16 Other

Figure 15: Share of Gross Value Added by sector for the South Downs National Park compared to the share of number of businesses (2023).



Sector Deep-Dives 2020-2024



Visitor Economy and Food and Drink

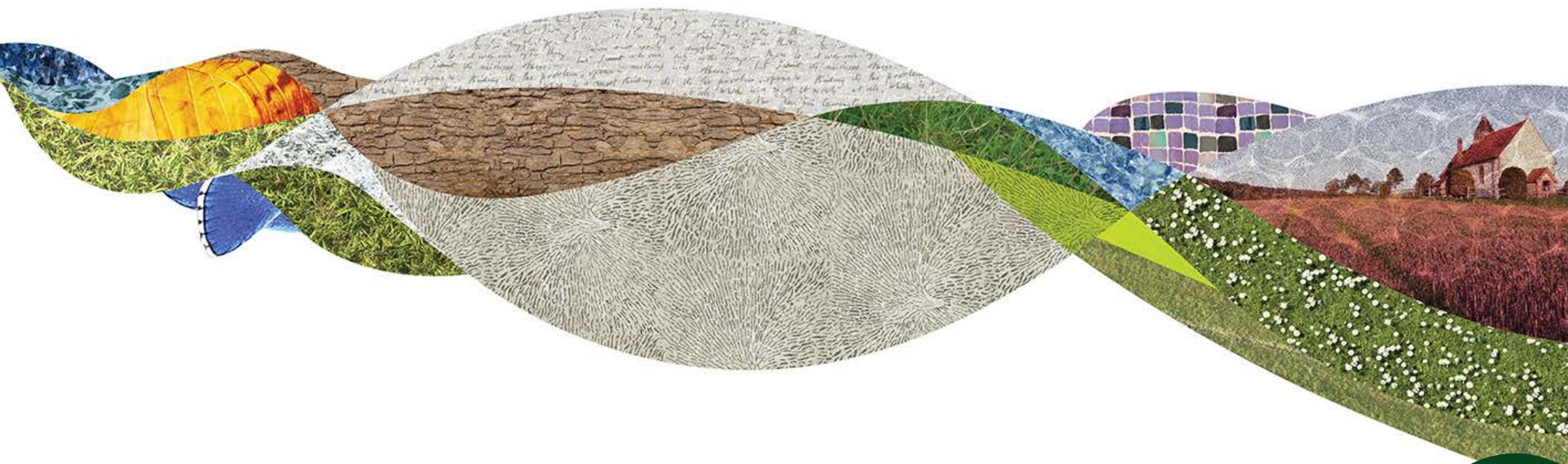
Introduction

The South Downs National Park (SDNP) is the second most visited National Park in the UK, welcoming 19.2 million visitors per year (15), back above the pre-Covid high of 19.08 in 2018 for the first time.

As one of the closest National Parks to London and the South East, the South Downs National Park offers easy access to nature, heritage, and tranquillity

economy has been shaped by extraordinary forces – lockdowns, a dramatic pivot to domestic tourism, rising sustainability awareness, and economic uncertainty.

This summary provides a deep dive into visitor trends, economic impact, tourism infrastructure, sustainability pressures, and the evolution of experiences in the National Park between 2020 and 2024.



Headline Statistics

19.2 million

estimated total visitors to the South Downs National Park in 2023, with over 90 percent being day visitors.

.....

£413.93 million

direct spend by visitors to South Downs National Park in 2023; total impact estimated above **£553 million** with supply chains.

.....

748,000 tCO2e/year

emissions from tourism activity in the South Downs National Park; 62 percent from travel.

90 percent+ of visits

are day trips; overnight stays within the national park grew from **6 percent to 10 percent** of visitor days between 2018 and 2021.

.....

Overnight tourists make up 26 percent of total economic impact

despite representing around 10 percent of visitor days.

Glamping providers have doubled since 2014,

and the sharing economy, including Airbnb and Vrbo, has exploded. Employment in the camping sector as a whole is tripling.

.....

Visitor economy (18 percent) and food and drink (10.3 percent)

employment have grown since 2020 and both back to 2019 levels.



People in the Landscape. Copyright: SDNPA

Who visits and why

The South Downs National Park saw a massive shift in how, when, and why people visited between 2020 and 2024.

While visitor numbers dipped sharply in 2020 during national lockdowns, the National Park quickly rebounded – particularly through the ‘staycation boom’ of 2021 (16).

Day visitors remain dominant, accounting for more than 90 percent of all recorded visits.

However, overnight visits – though smaller in volume – now account for more than a quarter of all visitor spending. Higher per-head expenditure and longer dwell time mean that even a modest increase in overnight stays makes a substantial economic difference (17).

Rural and nature-based tourism saw a significant resurgence after 2020,

as lockdowns and travel restrictions prompted more people to seek open spaces, fewer crowds, and low-carbon domestic holidays. Nationally, VisitBritain reported a 27 percent increase in rural day trips between 2020 and 2022, and the South Downs mirrored this pattern with visitor numbers rebounding to pre-pandemic levels by 2022

(18). In villages such as East Meon and Cocking, seasonal influxes linked to walking festivals, glamping, and guided experiences became more pronounced, contributing to a localised tourism economy focused on nature access and slower experiences (19).

The ‘nature reconnect’ trend has continued to deepen, with visitors increasingly favouring slow tourism and meaningful engagement with local food, heritage, and outdoor activities. Most visitors to the South Downs National Park still arrive for the day, primarily from Sussex, Surrey, London or Hampshire. Walking, cycling, and countryside pub visits remain the most common activities. However, since 2021, overnight stays have grown significantly, particularly through self-catering cottages, short term holiday lets and glamping sites (20).

The most notable shift since 2020 has been why people visit. There’s now a marked tilt towards immersive, slower-paced, and more experience-led tourism. The National Park has almost certainly seen increased demand for guided foraging walks, vineyard tours, photography workshops, and wellness retreats, as a national trend is changing fast towards green escapes and staycations. VisitBritain research

in 2019 already showed 59 percent of domestic tourists choose destinations for the experiences offered, with vineyard tours and behind-the-scenes experiences ranking high (21).

Visit England's attractions survey found farm attractions had the highest visitor growth of any attraction type 2023-2024 (+11 percent YoY), reflecting the shift to outdoor experiences. Visit England's attractions survey found farm attractions had

the highest visitor growth in 2024 (+11 percent YoY), reflecting the shift to outdoor experiences (22).

Interestingly, longer stays have become more attractive – not just from leisure travellers, but also from remote workers. These visitors seek connection to nature, culture, and good food – spending more per day than traditional sightseers (23).



Ridgeview Estate vineyard. Copyright: SDNPA and Mischa Haller

Where money is spent

Direct visitor spend within the South Downs National Park was estimated at £413.93 million in 2023, recovering from the £162.27 million low of 2020. By 2022, the spending levels in the park were back on the pre-pandemic growth trajectory. When multiplier effects are included – such as supply chain impacts and employee spending – the total value of tourism to the South Downs National Park economy in 2023 was calculated to be £553.6 million (24).

Accommodation and food services continue to dominate, accounting for approximately £188 million of direct spend in 2023. Local pubs, guesthouses, and restaurants adapted impressively post-2020, with many adopting click-and-collect services, outdoor dining, and farm-to-fork offers to meet shifting visitor expectations.

The National Park's visitor economy is increasingly intertwined with the success of creative, cultural, and agri-tourism ventures. Vineyard tours, artisan markets, foraging workshops, and heritage trails contribute both to direct spending and the region's distinct brand identity. The South Downs National Park brand is widely recognised as a marker of quality, attracting visitors who favour curated and sustainable experiences.

Although overnight visitors represent 3% of all visitors, and under 10 percent of all visitor days, they still account for 26 percent of total tourism revenue, due to significantly higher per-head spending on accommodation, food, experiences, and shopping.

The £413.93 million in direct tourism spend in 2023 breaks down approximately as follows:

Accommodation and food: £225.61 million

Retail trade (tourism influenced): £55.39 million

Attractions and entertainment: £67.22 million

Transport (local and access travel): £65.70 million

Compared to 2018, the composition of direct visitor spend has not changed significantly. Compared to 2018, 2023 shows accommodation down from 14.9 percent to 13.3 percent (–1.6 pp), food & drink up from 31.4 percent to 32.1 percent (+0.7 pp), recreation up from 10.9 percent to 11.2 percent (+0.2 pp), and transport up from 12.9 percent to 13.2 percent (+0.3 pp).



The George at East Meon. Copyright: SDNPA and AndrewPickettPhoto.com

Tourism remains a critical pillar of the local economy. Many businesses across the South Downs National Park – from hotels and glamping sites to farm shops and cultural venues – are directly or indirectly reliant on visitor income. Local producers, including vineyards, breweries and artisanal food makers, benefit from both direct visitor sales and supplying the wider hospitality network.

Since 2020, flagship festivals and events in and around the National Park have played a vital role in reviving tourism, boosting the local economy, and driving near-total occupancy in local accommodation.

The Goodwood Festival of Speed attracts over 200,000 visitors annually, with each day drawing up to 55,000 people. Its broader events portfolio contributes around £323 million to the wider West Sussex, Hampshire and Surrey economy

(25). During these events, hotels and Bed and Breakfasts within a 30-mile radius frequently reach full capacity, with some room prices surging to £1,500 for a weekend (26).

The Boomtown Fair, held near Winchester, draws 65,000+ attendees each summer. Visitors spend over £12 million locally, with noticeable spikes in trade for shops, pubs, taxis and hotels – although the most recent formal data is from 2015 (27). Despite widespread on-site camping, local accommodation still reaches 100 percent occupancy.

Cultural events such as the Glyndebourne Opera Festival bring in around 40,000 high-spending visitors and generate £16.2 million annually for the East Sussex economy (28). The Love Supreme Jazz Festival also draws 40,000 music fans to Glynde each July, and has recently become recognised as one of the biggest jazz festivals in Europe (29).

Community-scale festivals like Petworth Literary Week, MADhurst, and Petersfield's Christmas Market have all reported record footfall post-pandemic. These events support local high streets and independent traders beyond just footfall trade, through reputation and community cohesion as well (30).

Seasonal initiatives like the Dark Skies Festival and ReNature engage thousands of visitors in off-peak months, supporting winter hospitality and cultural venues (31). These events extend far beyond tourism, driving year-round footfall, raising regional reputation, and supporting livelihoods across the park's rural economy.

Accommodation trends

While large hotels and holiday parks remain steady, there has been strong growth in self-catering cottages, glamping, and short-term holiday lets. The Visitor Accommodation Review states that the average occupancy in the National Park is 59 percent – and shows an improving trend from 2022 (53.5 percent), with areas of high peak seasonal demand, such as in self-catering accommodation with occupancy rates of 78 percent in July and August .

Short-term lets and glamping in particular have expanded, especially in West Sussex locations such as Amberley, East Meon and Lodsworth. AirDNA data corroborates that South Downs National Park locations in West Sussex achieved some of the highest rural occupancy rates in England during 2021-2023 (32). Growth in hybrid and diversified accommodation – such as farm-based retreats, shepherd’s huts and eco-lodges – has accelerated, supported in part by post-2020 lifestyle shifts and continued demand for nature-connected stays.

The sharing economy alone (eg. Airbnb/Vrbo units) accounts for 9.7 percent of the £413.93 million direct visitor spend (£40.2 million) and with an average spend per booking of £561, so it is becoming a considerable driver of the National Park’s visitor economy (33).

Meanwhile, traditional hotel stock has remained flat or declined slightly, particularly mid-market family hotels. Some properties, especially in Midhurst and Petworth, have been repurposed into luxury rentals or private homes, limiting availability for short-stay visitors (34).

Camping/caravan/glamping sites rose from 33 in 2014 to 68 in 2025 (106% increase), whereas serviced Bed & Breakfasts and Guesthouses have declined in number by 79% since 2014. This reflects the national trend, and also partly due to providers turning to other distribution channels like Airbnb and, therefore, moving from the tourism economy to the shared economy (35).

In both Hampshire and East Sussex sections of the National Park, glamping units have doubled since 2014, some businesses using rural diversification schemes such as Rural England Prosperity Fund to do so. These accommodation models not only align with the National Park’s low-impact ethos, but also provide flexible income for landowners and farmers.



Housedean campsite. Copyright: SDNPA and Mischa Haller

Transport, accessibility and sustainability

Transport remains both a vital enabler and a major pressure point for tourism in the South Downs. According to the National Park Authority, visitor-related emissions total approximately 748,000 tonnes of CO₂e annually, with 62 percent attributed to travel to and from the National Park, especially by private car (36).

Rural areas like the South Downs face additional challenges due to limited public transport options, leading to increased reliance on cars (37). Connectivity for rural or evening travel continues to be limited, affecting both visitor behaviour and workforce mobility.

Efforts to encourage lower-impact travel have included targeted campaigns like *Rail to Ramble*, investments in cycle infrastructure, and new part South Downs National Park Authority-funded 'art shuttle', as well as services provided by some vineyards. The *Discover England Fund* programme piloted car-free itineraries in protected landscapes, including the South Downs, to reduce carbon per visitor and promote slower travel experiences (38).

However, these initiatives remain at early stages. Surveys and mobility reports show that lack of integrated ticketing, infrequent rural services, and inconsistent information remain significant barriers to non-car access (39).

Transport emissions per visitor is a key success metric in balancing tourism growth and tourism impact. Measures, such as encouraging visitors to stay multiple nights



The Trundle, cycling. Copyright: SDNPA

and explore locally by foot, bike or shuttle, will be key to balancing economic and environmental impacts of tourism.

Transport now sits at the heart of climate strategy and visitor planning within the South Downs National Park, as the National Park Authority and local councils align Net Zero goals with tourism growth.

Destinations and experiences

The most notable change since 2020 is the rise of experience-based tourism. While some traditional attractions (castles, museums) struggled to regain visitor numbers, newer or more adaptive offers have flourished (40).

Guided walks, wild foraging, wellness retreats, vineyard tours, nature photography, and craft workshops have seen strong growth – particularly when led by local practitioners and marketed online. Digitalisation has enabled micro-tourism: visitors now book niche experiences such as woodland carving sessions or butterfly safaris directly with providers, often driven by Instagram or local experience platforms like Airbnb Experiences and CoolStays (41).

Thematic campaigns such as VisitBritain’s “Escape the Everyday” and Experience Sussex’s “Reconnect in Nature” have helped reposition the South Downs as a core part of England’s ‘Slow Travel’ and ‘Green Escape’ offer (42).

Events like MADhurst in Midhurst, the Petworth Literary Festival, and open studios across Lewes, Alton and Petersfield have returned strongly since 2022, supporting shoulder-season visitation and reinforcing the National Park’s cultural offer (43).

Vineyard tourism continues to be a particularly strong segment, with Rathfinny, and Wiston among the most visited sites (44). Guided tastings, open days, and food-pairing events are increasingly driving bookings outside peak summer months.



Photographing wildlife at RSPB Pulborough Brooks. Copyright: SDNPA and Mischa Haller

Workforce and business adaptation

The visitor economy continues to be a significant employer across the South Downs National Park. In 2023, 11,685 jobs in the South Downs National Park were linked directly to tourism sectors – including accommodation, food and drink, transport, and attractions (45).

While the 2020 furlough schemes mitigated the most severe immediate job losses, the sector faced considerable disruption in 2021-22 due to labour shortages, skills gaps, and recruitment challenges. This was particularly acute in hospitality, catering, and visitor services – with many workers leaving the sector permanently (46).



Flower activity. Copyright: SDNPA and Mischa Haller

Since then, many businesses have adapted their models. Common responses have included reduced opening hours, simpler menus, flexible staffing, and seasonal operations to maintain viability during off-peak periods (47).

Digital transformation has also played a key role. According to regional workforce data, over 60 percent of tourism-facing businesses in and around the South Downs National Park now offer online booking – up from just 35 percent in 2019 (48). Many have expanded their digital presence, including online sales, virtual tours, and social media promotion. This has created new demand for digital marketing skills, logistics roles, and tech-enabled customer service (49).

Smaller operators – such as foraging guides, outdoor adventure companies and vineyard hosts – have particularly benefited from niche online platforms, helping them reach wider audiences while offering bespoke, high-quality visitor experiences.

Strategically, while the day-visitor market remains the majority by volume, the long-term value lies in higher-spend, longer-stay, lower-impact visitors. Businesses that adapt to this model – offering curated local offers, specialist activities, and sustainable practices – are more likely to thrive. However, access to reliable transport and broadband infrastructure remains an ongoing barrier for workforce and business innovation across some rural parts of the National Park (50).

Challenges and risks

In summary, despite the resilience and adaptability shown by the visitor economy in the South Downs National Park, several structural challenges remain that could limit its sustainable growth and long-term value.

● Persistent workforce gaps

There is continuing demand for skilled labour in hospitality, food service, seasonal logistics and digital marketing – roles which are essential for maintaining quality and competitiveness in tourism services. Recent data highlights persistent recruitment issues in these areas, partly due to the seasonal nature of many jobs and constrained local labour pools. While the shift to higher-value experiential tourism may ease reliance on low-wage volume roles, it increases pressure on businesses to attract workers with more specialised skills.

● Infrastructure and planning constraints

The development of new accommodation types and visitor infrastructure is determined by National Park planning regulations. While diversification through glamping and self-catering has expanded in recent years, there has been a reduction in traditional serviced accommodation (i.e., hotels, Bed & Breakfasts and Guesthouses etc.) due (in part) to the significant growth of the sharing economy (i.e., Airbnb, Vrbo etc.). This has changed the options for overnight visitors and can impact innovation in tourism offers.

● Incomplete visibility in the data

Tourism statistics are typically compiled at local authority or county level, making it difficult to track precise economic contributions and visitor behaviours within the South Downs National Park boundaries. While models like Global Tourism Solution's The Scarborough Tourism Economic Activity Monitor (STEAM) tracker provide robust estimates, gaps remain around visitor profiles, off-peak patterns and disaggregated spend, a lack of granularity limits effective planning and evaluation.

● Ongoing reliance on car-based travel

Travel to and within the South Downs National Park remains overwhelmingly car-dependent. The vast majority of visitors arrive by private vehicle, with limited alternatives for accessing rural destinations, particularly outside peak hours or in off-season months. Despite campaigns like Rail to Ramble and pilot shuttle schemes, modal shift has been modest. Emissions from visitor travel continue to represent one of the largest contributors to the National Park's tourism carbon footprint.

● Seasonal concentration of demand

While the number and variety of tourism experiences have grown, activity remains heavily weighted toward the spring and summer months. Average yearly occupancy for self-catering is 52-58 percent, and peaks above 70 percent in summer. This intensifies employment volatility, stretches infrastructure during peak weeks, and limits the economic resilience of tourism-dependent businesses.

Land-Based Economy

Introduction

Land-based industries are the beating heart of the South Downs National Park. They shape the landscape, steward natural resources, and support a resilient rural economy. From traditional farming to cutting-edge rewilding ventures, around 400 (51) businesses across the National Park are rooted in the land. This summary

explores how these sectors have evolved between 2020 and 2025 – through Covid-19, Brexit, climate pressures, and the shift to new agricultural policies – and how they are adapting with innovation, environmental care, and local pride.



Headline Statistics

400

land-based businesses in the National Park – 6.7 percent of all local businesses.

.....

£67.9m

direct Gross Value Added from core land-based production.

.....

906

agricultural holding manage over **70 percent** of the National Park's land.

49 vineyards

produce wine across the South Downs National Park.

.....

Over 30

businesses are now trading in biodiversity, carbon and rewilding services across the South Downs.

Over 33,000

wine tourists visit South Downs vineyards each year.

.....

The land use, land use change and forestry (LULUCF) sector

in the National Park emits **207,304 tonnes CO2-equivalent per year**, but absorbs 91.5% of those emissions with significant forestry carbon absorption offsetting agricultural emissions.

Farming

Farming dominates land use across the South Downs. 906 agricultural holdings employ 2772 workers, covering a rich mix of arable, livestock and mixed farming. The area is particularly strong in cereals, sheep and cattle grazing: the three largest land use on holdings.

Since 2020, farming has been tested by post-Brexit reforms, labour shortages, and volatile weather. The phasing-out of European Union (EU) subsidies under the Agricultural Transition Plan means farmers are adapting to new payment schemes rewarding environmental public goods. Covid-19 brought supply chain disruption, but also renewed interest in local food and farm resilience.

The National Park Authority responded with initiatives like interactive local food maps, helping farmers connect with customers during lockdowns. Since then, diversification has become key – from glamping and farm shops to on-site processing and education programmes.

New approaches to regenerative agriculture are



also gaining ground. More farms are using cover crops, rotational grazing, and hedgerow planting to build soil health and sequester carbon. Funding from schemes like Farming in Protected Landscapes (FiPL) has supported projects ranging from carbon auditing to habitat restoration (52).

Though smaller in scale, horticulture plays a key role – particularly on the West Sussex coastal plain. In the National Park itself, at 41 holdings grow fruit, vegetables or ornamental plants (53).

Horticulture offers a mix of seasonal and specialist jobs, including growers, agronomists, and tech-based roles in climate-controlled greenhouse farming. Since 2020, the sector has faced severe labour shortages – leading to greater investment in automation, robotics, and smarter irrigation systems.

Covid-19 caused big swings: ornamental growers lost critical spring trade in 2020 but rebounded as gardening boomed. Many shifted to online sales and local delivery. Fruit and veg growers struggled with



Durleighmarsh farm shop. Copyright: SDNPA and Mischa Haller

harvests due to lack of pickers but benefited from strong supermarket demand. Water use and energy prices remain challenges, especially during summer droughts.

The sector's future is likely to be increasingly tech-driven, with a growing emphasis on water and carbon efficiency – and skills needs rising fast to match.

Agriculture remains dominant within South Downs National Park, comprising around 440 agricultural, forestry, and fishing enterprises in 2020, slightly decreasing to approximately 400 by 2024 (54).

Agriculture employs 2772 people (55), underpinning the rural economy. Gross Value Added from agriculture, forestry, and fishing sectors combined is £67.9 (56) million annually (direct).

The 2024 Defra Farm Business survey has given us a national picture of diversification trends. Nationally, 71 percent of farm businesses were involved in diversified (non-agricultural) enterprises in 2023/24, a significant rise from earlier years. Given the South Downs National Park's strategic location and market proximity, the local diversification rate is expected to reflect or exceed this national average. Common local diversification includes holiday accommodation, farm shops, renewable energy, and equestrian activities.

About 17 percent of UK farms had negative farm business income in the same year, rising from

approximately 10 percent the previous year. On stricter measures, 25 percent of farms nationally had no net profit after considering full costs. The South Downs National Park likely mirrors these trends (57).

An estimated two-thirds to three-quarters (approximately 70 percent) of farms nationally have some form of off-farm or diversified income (58). This diversified income is increasingly vital due to reduced subsidies post-Brexit and volatile agricultural markets.

Agriculture, forestry, and fisheries collectively contribute 185,515 tonnes CO₂-equivalent emissions accounting for 12 percent of South Downs National Park's total emissions (59). Agriculture is the dominant contributor, driven mainly by livestock (methane), manure management, and fertiliser use.

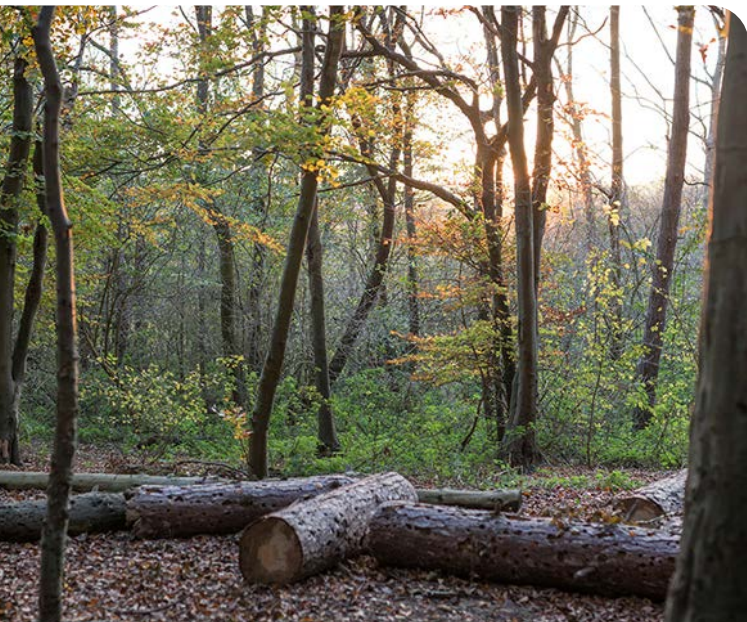


Milking time at Middle Farm. Copyright: SDNPA and Mischa Haller

Forestry

Forestry may be small in direct economic terms – approximately 20 businesses – but its role in the National Park’s identity, carbon storage and biodiversity is huge. The South Downs has 23% percent woodland cover (60).

Most forestry activity focuses on conservation and sensitive management – coppicing, selective felling, continuous cover methods, and heritage woodland care. Timber production does exist, particularly for



Seven Sisters Way South Downs. Copyright: SDNPA

biomass and furniture, but economic value lies equally in recreation, water purification, and climate mitigation (61).

The last few years have seen challenges, including ash dieback and workforce shortages. But demand is rising – for woodland creation, woodfuel, and biodiversity services. South Downs National Park Authority’s ReNature programme and the England Woodland Creation Offer are helping fund planting and woodland restoration, often by small contractors and tree nurseries (62).

Forestry in South Downs National Park is primarily focused on sustainable woodland management, conservation, and recreational use. Economic output is modest compared to agriculture, but indirect benefits (e.g. visitor attraction, ecosystem services) significantly amplify its value.

Forestry significantly contributes to carbon sequestration. The Park’s woodlands absorb 185,515 tonnes CO₂-equivalent per annum, offsetting most land-sector emissions and positioning forestry as a net carbon sink (63).

Environmental land management

Perhaps the fastest-growing land-based subsector is land management and conservation. This includes habitat restoration, rewilding, carbon farming and biodiversity net gain. At least 30 businesses – from ecological consultancies to estate teams – are active in this space.

The headline here is the rise of nature as a product. Rewilding projects like Halnaker Hill Farm (Chichester) are now offering biodiversity units for developers under the new Biodiversity Net Gain policy. In Halnaker’s case, 330 acres of land have been turned into habitat mosaics, selling 856 biodiversity units to the market (64).

ReNature, FiPL, and the national Environmental Land Management schemes all support this shift, blending public and private funding. There is strong demand for skills in species monitoring, land use planning, and carbon accounting.

This part of the economy is expected to expand rapidly, especially if new green finance models scale up and more landowners shift to conservation-focused income.

Fisheries

Commercial fisheries are minimal in the South Downs National Park due to limited coastal exposure. A maximum of 10 aquaculture/ fishing enterprises exist (65).

The carbon footprint of fisheries within South Downs National Park is negligible, accounting for less than 1 percent of land-based sector emissions.

Viticulture

English wine is booming, and the South Downs is leading the charge.

Planning guidance published by South Downs National Park Authority in 2021 encourages vineyards to deliver multiple benefits – biodiversity, sustainable drainage, and visual integration into the landscape. The sector also supports carbon savings by replacing imported wine and drawing visitors to local destinations rather than overseas trips (66).

Future growth potential is massive. Up to 39,700

hectares in the National Park may be suitable for vines – 10 percent of that could yield 22 million bottles annually and hundreds of new jobs. But expansion must be managed sensitively, balancing landscape protection and infrastructure.

According to 2025 data from the Food Standard Agency vineyard register, There are 212 vineyards across the whole of Sussex and Hampshire with 49 in the National Park itself. This is nearly double the number in 2016, but slightly down from 51 in 2021 (67). The National Park's chalk soils and warming climate make it ideal for sparkling wine grapes, and the economic rewards can be substantial. Large French and German wine estates are now investing in Sussex viticulture businesses (68).

Vineyards and wineries in the National Park generate around £24.5 million annually in wine sales, employ 358 permanent and seasonal staff directly, and support approximately 1,650 jobs indirectly through tourism (69). Gross Value Added per hectare can reach £13k, compared to just under £1k for cereals (70). This high Gross Value Added figure is also partly due to the growth in wine tourism – with over 33,000

visitors annually enjoying tastings, tours and vineyard stays (71).

Viticulture's carbon footprint currently remains modest due to limited scale, embedded within agriculture's emissions profile. Expansion could increase emissions slightly, but viticulture remains a minor contributor relative to other sectors.



Ridgeview Estate Vineyard. Copyright: SDNPA and Mischa Haller

Crosscutting themes

The period since 2020 has exposed both vulnerabilities and adaptive strengths across agriculture, viticulture, and forestry in the South Downs National Park. Several cross-cutting trends are evident:

● Resilience through localism:

Covid-19 amplified consumer demand for local food, nature access, and environmental connection. Enterprises able to pivot – such as vineyards with direct-to-consumer channels or farms offering food boxes and visitor experiences – recovered more rapidly than others.

● Policy-driven transformation:

The removal of EU Common Agricultural Policy subsidies post-Brexit has accelerated structural change. Evidence suggests a marked increase in diversification efforts, particularly among small and medium-sized farms introducing accommodation, nature tourism or education-based income streams.

● Climate change as dual driver:

Climate volatility is creating both stress and market opportunity. Unpredictable rainfall and rising temperatures are altering crop profiles, with viticulture and regenerative methods gaining ground. Carbon offsetting and land stewardship schemes are also emerging income avenues for landowners.

● Technology and skills mismatch:

Precision farming, remote monitoring, and data-led land management tools are increasingly adopted. However, digital skills remain a barrier, particularly in traditional land-based sectors such as forestry and livestock farming.

● Blended business models:

The most economically stable rural enterprises in the National Park now combine farming with other uses – such as hospitality, retail, biodiversity enhancement or education. This multifunctionality reflects a broader trend toward 'stacking value' from the landscape, rather than relying on single-use land economics.

Manufacturing

Introduction

Manufacturing and engineering forms a quietly influential backbone of the rural economy. While small in number, manufacturing firms make a significant contribution in terms of employment and local resilience.

As of 2024, there were approximately 280 manufacturing firms within the South Downs National Park, representing 4.7 percent of all businesses.



Headline Statistics

Manufacturing makes up 4.7 percent of South Downs National Park businesses.

A higher share than other UK National Parks and close to the South East regional average.

The sector supports up to 10 percent of total jobs,

with strong growth in food, drink and chemical production.

Since 2019, manufacturing employment has grown by up to 20 percent,

led by anchor employers and artisan producers.

Whitman Laboratories (the main UK manufacturer for cosmetics firm Estée Lauder Companies Inc) has grown over 50 percent since 2020

now employing around 1,000 people.

Skills shortages

are a challenge, with experienced staff exiting the workforce at a higher rate than young workers can be recruited.

Manufacturing contributes carbon emissions of approximately 602,500 tCO₂e/year,

40 percent of the emissions from industry from the National Park.

Green manufacturing is gaining pace,

with South Downs National Park-based businesses pioneering net zero and sustainable practices.

The manufacturing mix



*Worker at Ridgeview Estate Vineyard.
Copyright: SDNPA and Mischa Haller*

Manufacturing in the South Downs is shaped by scale, tradition, and quality. The share of manufacturing businesses is a higher share than most other UK National Parks and broadly comparable to the South East average of 5.1 percent.

The dominant subsectors are food and drink, woodworking and furniture, metal fabrication, and chemical manufacturing. Notably, around 10 percent of manufacturing firms in the South Downs National Park are in food and drink production. Furniture makers make up another 10 percent, and are often located in rural workshops or converted agricultural buildings.

The sector is characterised by a large number of micro and small firms: over 90 percent of South Downs National Park manufacturers employ fewer than 10 people, consistent with regional trends. These businesses often serve niche or local markets and are embedded in the cultural and economic fabric of their communities. Examples include artisan cheesemakers,

vineyard bottlers, and heritage print firms.

In terms of technology intensity, firms in the National Park lean more heavily towards lower-tech and medium-tech production. According to 2023 sectoral classification, only 6.4 percent of South Downs National Park manufacturing firms fell into high-tech categories (e.g. electronics, digital, optics), while 12 percent were classified as medium to high tech, such as precision instruments or specialised equipment. The remainder operated in low or medium-low tech sectors, such as food, furniture, textiles and metals.

This reflects the South Downs National Park's strength in hands-on, place-based production, which is less reliant on automation and more aligned with sustainability and heritage branding. The mix is also geographically distributed: for example, the majority of breweries and vineyards are more concentrated in Mid and East Sussex, while metal workshops and machinery firms cluster closer to Petersfield, Liss, and Midhurst.

Key employers and sector growth

Despite representing a small share of businesses, manufacturing supports up to 10 percent of all jobs in the National Park. From 2020 – 2023, the sector has added 905 jobs: 400 in chemical manufacturing and 250 in food and drink.



Petersfield industrial site. SDNPA and Mischa Haller.

According to Companies House, leading employers include:

Whitman Laboratories (Petersfield): A major Estée Lauder chemicals production site and the largest manufacturing employer in the National Park, growing by over 50 percent since 2020 and now employing ~1,000 people.

Hunt Developments (Midhurst): Specialist casings for medical, aerospace and automotive applications.

Langhams, Harvey's and Long Man breweries, Ridgeview and Rathfinney wine estates: Artisan producers with local sourcing and strong brand appeal.

Strategic links

Manufacturing in the South Downs is closely intertwined with the region's distinctive land-based economy. Many of the National Park's most successful manufacturers are directly linked to farming, food processing, and heritage skills – creating a uniquely place-rooted production base.

This includes wine, cheese, baked goods, preserves, spirits, and ice cream – all of which benefit from the South Downs' agricultural richness and brand identity. These businesses not only generate employment and exports, but also form a key part of the visitor experience, from vineyard tastings to brewery tours (72).

This sector blurs the boundaries between primary production, manufacturing, and tourism. For example:

Ridgeview Wine Estate and Albourne Estate combine viticulture, production, and hospitality in one business model.

Farm-based kitchens and dairies produce small-batch cheese and preserves for both local sale and national retailers.

Food and drink festivals, such as those in Lewes, Midhurst and Petersfield, provide platforms for artisan manufacturers to showcase their products and strengthen direct-to-consumer links.

As a result, the manufacturing sector acts as a multiplier for the rural economy – supporting farmers, tourism operators, packaging suppliers, and logistics businesses. The strength of this integration is a strategic asset for the National Park, especially in an era where consumers are increasingly demanding traceable, high-quality, low-impact products.

This integrated economy also underpins the National Park's branding as a producer of premium, ethical goods – from hand-crafted furniture to carbon-conscious sparkling wine. These associations enhance the South Downs National Park's economic resilience and align with broader priorities in net zero transition, food security, and rural livelihoods (73).



*Buying ice-cream on Ditchling Beacon.
Copyright: SDNPA and Mischa Haller*

Sustainability and net zero

As the largest National Park economy in the UK, the South Downs also carries a significant emissions footprint. Manufacturing as the largest industry sector emitter of CO₂ is part of the decarbonisation challenge. In terms of addressing this, several South Downs National Park firms are already leading the way.”

- **Albourne Estate** (Albourne): Achieved net-negative carbon status in 2020 through renewable energy, land sequestration and energy efficiency (74).
- **Jude’s Ice Cream** (Twyford): A certified B Corp, using solar power, plant-based ingredients, and sustainable sourcing to pioneer low-impact production (75).

Concrete data on emissions reductions by individual firms is not centrally published, but the progress is evident from the sustainability certifications and case studies. In a recent pilot of the Green South Downs initiative, 19 businesses collectively implemented measures such as reducing energy use and single-use plastics, cutting water consumption, and creating wildlife habitats on their sites (76).

Challenges and risks

Digital and transport infrastructure also is a challenge in some areas. Although projects like Gigabit are in progress, around 15 percent of East Hampshire still suffers from poor broadband and patchy mobile coverage, directly affecting business productivity and access to digital tools (77). On the transport side, congestion, roads unsuitability, and lack of public transit options limit both goods movement and workforce mobility. Midhurst, for example, has faced repeated disruption due to road closures – first from a major fire, then from structural damage to key bridges.

Staffing presents another serious barrier to growth. Manufacturing firms report difficulty recruiting skilled technical staff and retaining younger workers. The National Park’s geography makes travel to colleges or training providers difficult, and many young people face limited local options for gaining industry-relevant experience. For older firms, succession planning is becoming a growing concern. Many are family-run, and without clear handover plans, there is a risk of closure when owners retire (78).

High Street Health Check

Introduction

The market town high streets remain a major part of the local economy in the South Downs National Park (SDNP), shaping everyday experiences for residents and offering hospitality and cultural value to visitors.

This profile draws together data and narrative insights about the four market towns found within the South Downs National Park: Petersfield, Lewes, Midhurst, and Petworth to provide a snapshot of high street vitality and business health across the National Park over this period.



Independent traders, family-run businesses, and local producers are described as the “lifeblood” of market towns (79), sustaining both economies and cultural heritage. Market towns are, in many ways, a reflection of how a community sees itself. There is clear evidence of this within the four towns examined, enabling them to remain resilient during a very challenging period.

In addition to retail and services, these high streets are becoming increasingly valued as social and cultural spaces. As online shopping becomes more prevalent, the high street’s role has shifted toward providing experiences that cannot be digitised – cafés, salons, events, and cultural venues now account for a growing proportion of town centre activity in all four towns (80). Public realm improvements, such as widened pavements, parklets, and flexible licensing for outdoor dining, are all strategic investment decisions being encouraged by central government to local authorities in order to make the most of this role (81).

The period 2020-2024 tells one major story: the Covid-19 pandemic and the post pandemic recovery. Lockdowns, shifts to online retail, and reduced tourism decimated footfall and impacted businesses immensely. These effects are evident in both the data and the reality of how the high streets look now. However, by 2023, the towns were showing resilience and a recovery that outpaced many urban centres.

Planning rules were loosened nationally in 2020 with the introduction of Use Class E. This has led to the conversion of empty retail into cafés, workspaces, or for health



Haslemere cafe. Copyright: SDNPA and Mischa Haller

use. At the same time, South Downs National Park Authority, alongside councils, acted to prevent the loss of too much ground-floor retail to housing, using Article 4 Directions or heritage controls in key high streets.

This summary looks into high street health measures wherever available. It draws comparisons across the data where feasible but acknowledges limitations in producing comparisons across all towns, particularly the smaller centres of Midhurst and Petworth, both within Chichester District.

Headline Statistics

A story of resilience

across South Down's market towns in the face of the Covid-19 shock.

.....

Vacancy rates remained low

in all South Downs National Park towns: **between 6-10 percent**, well below the national average of 13-19 percent.

.....

Footfall has fully rebounded,

with many towns exceeding pre-Covid levels on peak days by 2023.

Community loyalty and government support

helped traders adapt quickly, with "shop local" campaigns and digital uptake boosting resilience.

.....

Affluent, professional populations and increased home-working

have strengthened local customer bases post-2020.

Future risks include

ageing building stock and rising pressure from hybrid online shopping behaviours.

High street profiles:

Petersfield

Petersfield traditionally serves a large rural area with a mix of independent shops, cafes, and some national chains along its high street and town square. Petersfield's economy historically benefits from its position on transport routes between London and Portsmouth. The town's high street entered 2020 in a healthy state with low retail vacancy rates at under 10 percent.

The pandemic's onset in March 2020 forced most shops to close temporarily and cancelled markets and events. Several national chains with local outlets including bank branches and some fashion retailers, closed permanently or consolidated during this time. Footfall fell to near zero during the first half of 2020 (82). Nonetheless, Petersfield's high street proved resilient, with many independent businesses adapting via online sales and click-and-collect.

The town largely bucked the national trend of empty storefronts, maintaining a vacancy rate well below the UK average of 19 percent seen in 2021. This

resilience was attributed to strong community support, a "shop local" ethos, and the town's relatively affluent customer base.

By late 2021, vacant units were already being reoccupied. Footfall also began recovering as restrictions eased, reaching around 70-80 percent of 2019 levels on average by 2021 (83). From mid-2022, footfall on market days and weekends was effectively back to pre-pandemic norms (84). East Hampshire district, which includes Petersfield, shows business enterprise numbers falling slightly from 4,430 in 2020 down to 4,350 in 2022. However, this represents a fall much smaller than the UK average. In Petersfield specifically, there was a reported surge in local crafting, sewing, and do it yourself during lockdowns which benefited niche retailers on Lavant Street, and shop-based creative industries reported healthy post-lockdown footfall (85).

By 2023, footfall data showed a full rebound on peak days. With only weekday commuter-driven activity down, affected by some of the larger healthcare and public sector employees still working from home.



Petersfield train station. Copyright: SDNPA and Mischa Haller

The high street's foot traffic was further boosted by the return of events: the Petersfield Christmas Festival and summer fairs in 2022 saw strong attendance. Petersfield benefited from domestic tourism and its outdoor attractions during this period, which drew people when indoor activities were restricted. The town's business community emerged from the pandemic with relatively minor scarring, and confidence was high by 2024 (86).

Petersfield's Neighbourhood Development Plan (updated in 2024) confirms local policy support for town centre vitality through mixed uses, design quality, and sustainable transport (87). Traders are increasingly exploring blended business models – physical retail spaces with online ordering or showroom-style display units – and local demand remains high for businesses that offer both products and gathering spaces. This reflects broader UK data showing that food and beverage units now account for nearly 1 in 5 high street occupiers (88).

Lewes

Lewes's is renowned for its unusually diversified retail base, dominated by specialist independent retailers. This character proved to be a strength during 2020-2024. At the end of 2019, Lewes Town Centre had 333 retail and leisure units, with an extremely low vacancy rate of 5-6 percent. The onset of the pandemic in early 2020 forced the closure of a large number of non-essential shops, and footfall collapsed dramatically, dropping by 60-80 percent in mid 2020. The cancellation of major events like the Lewes Bonfire Night in 2020 was a symbolic and economic blow (89).

Between 2020 and 2022, Lewes lost 7 percent of its shops, particularly national chains like Paperchase and M&Co, while independent businesses stepped-in, and showed more adaptability through local loyalty and agile trading models. While a few older businesses did close permanently, Lewes largely avoided the wave of empty shops seen elsewhere. By 2021, the vacancy rate was still the pre-pandemic level 6 percent (90).

The types of businesses popular in Lewes played a role in this. A large proportion were food shops, bakeries and pharmacies which were deemed essential and thus stayed open; and independent boutiques that had an online customer base and then could reopen relatively quickly with some safety measures put in place (91).

Lewes' recovery started showing from mid-2021 onwards. Earlier than the national average. As restrictions eased, footfall saw a healthy return, significantly increasing by summer 2021 compared to 2020, fuelled by 'staycation' visitors. Measures by the District Council, such as free parking periods and outdoor dining licenses, helped encourage people back into the town centre. By late 2021, footfall on



Shopping in Lewes. Copyright: SDNPA and Mischa Haller

weekends was reported to be about 85-90 percent of 2019 levels (92).

The recovery accelerated significantly between 2022-2024. Tourist numbers, including at attractions like Lewes Castle, were largely restored and the full calendar of events, including the return of Lewes Bonfire, drew large crowds once again (93). By 2023, new businesses were opening in previously empty units, including artisan food shops and craft retailers, keeping turnover healthy. Lewes's reputation for minimal chain-store presence held true; even as some national retailers struggled, Lewes's independent shops filled the gap.



Fruit stand in Lewes. Copyright: SDNPA and Mischa Haller

Lewes town centre has seen the introduction of co-working spaces in under-used buildings, like *Netzwerks* on Fisher Street and *The Hive* in converted retail units on the high street; a response to increased home working and demand for flexible local spaces.

Embracing e-commerce retail has been crucial. In Lewes district, the council partnered with businesses to introduce *Click It Local*, a platform allowing residents to browse and buy from dozens of independent shops online, with one combined checkout and same-day delivery. This service, described as an “ethical alternative to Amazon”, enables even small village

shops to have an online storefront and logistics for local delivery (94).

Lewes continues to balance tradition and reinvention. A 2021 town centre panel event revealed a strong appetite for more communal spaces, improved pedestrian access, and permission for more flexible uses – like co-working cafés and seasonal market stalls (95).

Midhurst

High street footfall in Midhurst would trend around regular key periods including the monthly farmers’ market, the annual MADhurst festival, Cowdray Polo tournaments and summer holiday season. Therefore, and with the high street primarily composed of independent “non-essential” businesses, it was hit hard by lockdown in 2020. While a few long-established businesses including a bank and some boutiques closed permanently in 2020-21, the slight rise in vacant shops remained limited. The town’s resilience during this initial shock was supported by local landlords’ flexibility, and community support networks, such as volunteers delivering groceries to help keep local businesses afloat.

The trajectory for Midhurst’s high street shifted towards recovery starting from mid-2021. Notably, some new shops opened during the recovery period, with an artisan bakery, cycle shop and a farm shop taking up spaces vacated. Business turnover on the high street thus included both closures in 2020 and fresh openings by 2022. Vacancy rates in 2021 were 8-10 percent. Notably below the national average of 19 percent (96).

By late 2021, the town’s retail vacancy rate, though slightly increased, remained well below national averages. In 2022 footfall improving significantly as Midhurst reinstated its full calendar of events, including the medieval festival and MADhurst. By summer 2022, visitor footfall was reported to be close to pre-pandemic levels, driven by domestic tourism. By 2023, Midhurst’s footfall patterns had largely normalised, and the Chamber of Commerce reported the same number of members as 2019.

Since 2020, Midhurst’s high street has seen a shift towards service and experiential businesses: beauty salons, independent cafés, a cycle shop, and specialist food retailers have all either survived or opened post-pandemic (97). These businesses rely



more on local loyalty and repeat visits than passing trade alone. After the devastating 2023 Angel Hotel fire, the council launched a digital marketing campaign to re-attract shoppers and reposition the town online – highlighting the increasing integration of both physical and digital high street marketing in order to maintain and build audiences (98). The town hosted its first Vegan Street Market in 2023 as part of its broader new audience strategy.

Petworth

Petworth's high street started 2020 with near full occupancy. The town was heavily reliant on visitor

traffic drawn by Petworth House & Park and its unique antique shops and galleries. So with both classified as non-essential as lockdowns came into force in 2020, they were forced to close. This led to a slight increase in vacant units by late 2020, as Petworth faced a significant economic shock to its highly visitor-dependent economy. There was a concern that some specialty businesses might not reopen.

During 2020 and 2021, however the community stepped up and helped shape a recovery.

Petworth received support from Chichester District's discretionary grant schemes, and with volunteer schemes like "Virtual Petworth" and the Business Association's "Discover Petworth" innovatively promoted businesses during and coming out of lockdown with events and e-commerce schemes (99).

The trajectory shifted significantly from spring 2021, when footfall began to recover as Petworth House partially reopened and domestic tourism increased. By summer 2021, footfall was noticeably up on weekends compared to 2020, though still below pre-Covid levels. The recovery accelerated in 2022 with a full-scale return of the Petworth Summer Festival, and domestic tourists rediscovering the area. By the

end of the year, shopkeepers reported that visitor footfall and sales were nearly back to 2019 levels. By 2023, footfall was rebounding to or exceeding pre-pandemic norms, and vacancy rates had stabilised at around 8 percent.

The town's reputation was bolstered in 2023 when it was named one of the UK's top ten high streets, praised for its "independent spirit and warm, traditional welcome". The mix of antique shops, destination food and drink venues, and seasonal markets suggests that Petworth has a resilience beyond retail. Business owners interviewed in local press attributed success not only to loyal customers but also to a strong emphasis on atmosphere and visitor experience – suggesting a future where café culture, street events, and hybrid retail become even more central (100).



The Green Economy



The Green Economy

Introduction

The South Downs National Park has become a testing ground for how nature, communities and enterprise can be integrated into a green economy. From rewilding projects to carbon-neutral tourism, a growing number of businesses and local authorities are aligning with a net zero agenda. The period from 2020 to 2024 saw major shifts: both in climate policy and in how rural economies positioned themselves in response to the twin demands of ecological crisis and economic recovery after Covid-19.

This section provides a digest of key data and stories from the South Downs National Park's green economy. It draws on business trends, project reports,

policy documents and environmental datasets to assess how sustainability-focused activity has evolved – and where there's scope for scale, innovation or redirection. The focus is on enterprise and investment within the National Park boundary that contributes directly to climate mitigation, biodiversity gain, and nature-based jobs.

There is no single definition of the green economy. But within the South Downs National Park context, it typically refers to activity connected to: low-carbon infrastructure, sustainable land management, nature recovery, renewable energy, local food systems, eco-tourism and environmental consultancy. This sector overlaps heavily with land-based industries and parts of the visitor economy.



Headlines

As of 2023, there are over 430 businesses

within South Downs National Park boundaries whose activity is primarily or significantly focused on sustainability or environmental management.

.....

At least 16 major rewilding, restoration or nature recovery projects

were live within the National Park between 2020 and 2024, covering **more than 6,000 hectares.**

Around 250 full-time jobs in the South Downs National Park relate directly to nature recovery, green infrastructure, or carbon reduction activities.

This figure is growing annually.

Visitor emissions account for over 25 percent of the National Park's total carbon footprint

– with clear scope for modal shift and green tourism initiatives.

Nature recovery and rewilding

Nature recovery – including rewilding, habitat restoration and species support – has been one of the most visible green economy drivers in the South Downs. The National Park has increasingly been a testbed for large-scale landscape interventions, often supported by public-private partnerships.

The Wilder Sussex initiative, led by the Sussex Wildlife Trust and Knepp Estate, includes rewilding corridors stretching into the National Park boundary. These projects, rooted in evidence from long-term ecological monitoring, now serve as national exemplars for biodiversity-led land management (101).

From 2021, the National Park Authority became a delivery body for the Farming in Protected Landscapes scheme, distributing grants to landowners for interventions such as restoring chalk grassland, planting hedgerows, and reducing run-off into rivers. By 2024, more than £2.8 million had been awarded across over 260 projects in the South Downs (102).



Seven Sisters landscape. Copyright: SDNPA

In the Hampshire Downs, the Selborne Landscape Recovery project – part of Defra’s first Landscape Recovery pilot cohort – is regenerating chalk streams and enhancing natural flood management. This project covers over 2,200 hectares and involves more than 30 farm holdings (103).

There is evidence of growing collaboration between conservation charities, farmers and tourism operators, bringing both environmental and economic returns. For instance, rewilding and regenerative agriculture schemes often now include visitor access components, specialist tours or local produce branding.

Climate and net zero strategy

The South Downs National Park Authority adopted a carbon baseline assessment in 2022 which calculated the total carbon footprint within the National Park boundary at 2.97 million tCO₂e per year. This includes emissions from land use, transport, buildings, and tourism (104).

Visitor-related emissions are particularly notable: over 748,000 tCO₂e annually, with a significant amount from transport. This positions the visitor economy as a key area for net zero interventions – such as promoting longer stays, low-carbon travel modes, and local food systems. Efforts to align accommodation providers with low-carbon standards have gained traction post-Covid.

The South Downs National Park Authority has supported the development of climate action plans in most of its market towns and many parishes. Several towns – including Lewes and Petersfield – now report against net zero targets, though their methods vary.

Between 2021 and 2024, dozens of projects have targeted local energy efficiency, including solar retrofits, insulation and low-carbon heating – often supported through Community Energy Pathways and LAEPs (Local Area Energy Plans). Whilst localised renewable energy generation is heavily constrained by planning regulations, some case studies in rural Sussex and Hampshire are showing some new approaches to community investment in renewables (105).

Green enterprise and jobs

While employment data specific to the green economy in the South Downs National Park is sparse, proxy indicators suggest steady growth. Through regular business engagement activities, the National Park Authority found that a rapidly increasing number of businesses were identifying as sustainability-led, or with environmental services as their main offer. From environmental consultancies and ecology firms, often spun out of conservation projects; through local construction firms specialising in low-carbon materials; to sustainable tourism brands. This has led to the development of the Our South Downs initiative.

The number of these types of businesses has grown post-Covid, partly as a response to shifting consumer values and new funding streams. The circular economy and ‘zero waste’ retail models have also seen uptake, particularly in market towns like Lewes.

Education providers and employers in the National Park continue to raise concerns about skills shortages in land management, environmental monitoring, retrofit trades and green construction (106).

The Our South Downs business network was officially launched in May 2022 by the South Downs National Park Authority. This initiative aims to unite small and micro businesses within the National Park, encouraging collaboration on sustainability efforts, promoting shorter rural supply chains, environmental stewardship through the Green South Downs certification scheme, skill-sharing, and supporting the region’s journey toward net zero and nature recovery goals. The network initially comprised 130 member businesses but had expanded to 440 businesses by mid 2025 (107).

Funding, policy and community initiatives

The South Downs National Park has seen a significant uptick in funding for environmental and sustainability activity between 2020-2024. This includes:

£2.8m from FiPL since 2021

Significant funding via the Heritage Lottery Green Recovery Challenge Fund and nature-focused levelling up grants across 2020-2025, including £1.7m for 'Downs To The Sea'

Over £500,000 for CPRE Hampshire, to create a planted link between the new forest and the south downs national parks. (108)

Community-led climate and nature action is also on the rise. Town and parish councils across the National Park have declared climate emergencies and created their own local action plans. The Greening Steyning group, for example, has mobilised hundreds of residents in retrofitting homes, tree planting and behaviour change campaigns (109).

Conservation charities are embedding green economy principles into site management, with strong focus on sustainable access and interpretation. For example, with initiatives like the *Changing Chalk* project, the Sussex Wildlife Trust is enhancing sustainable access by creating accessible footpaths and urban green spaces, aiming to improve health and well-being while encouraging a connection to the Sussex Downs (110). The National Trust manages several estates within the South Downs, such as Petworth and Devil's Dyke, focusing on habitat conservation and public engagement. Their recent work has included maintaining footpaths and providing interpretive materials to educate visitors about the natural and cultural heritage of these sites (111). Private estates such as Goodwood, Cowdray, and Wiston are integrating ecotourism into their operations. For example, Wiston Estate offers vineyard tours and luxury glamping accommodations, providing visitors with immersive experiences that highlight sustainable land management and local food production (112).

Conclusions and Recommendations



Conclusions and Recommendations

Between 2020 and 2025, the South Downs National Park has demonstrated significant economic resilience. Despite national and global turbulence – most notably the Covid-19 pandemic, Brexit, and the cost-of-living crisis – the Park’s economy has remained broadly stable. Business numbers have declined modestly, but employment has held steady or grown in key areas including public services, land-based industries, rural manufacturing, and visitor-facing roles.

High streets in towns like Lewes, Petersfield, Petworth and Midhurst have rebounded strongly, supported by loyal local customer bases, cultural vibrancy, and successful diversification into hybrid models of retail and hospitality. Meanwhile, farmers, foresters and food producers are engaging with new green economy opportunities, and creative industries are establishing roots in market towns and edge-of-park settlements.

The South Downs economy is not only unusually balanced for a protected landscape – it is evolving. A combination of climate action, digital infrastructure, and strong place identity is giving rise to a distinct local model of sustainable rural enterprise. However, continued progress will rely on targeted investment, responsive planning, and collaboration across sectors and geographies.

Opportunities

1. Meet the infrastructure needs of a modern rural economy

- **Tackle gaps in digital and physical infrastructure**, especially in remoter parts of Hampshire and West Sussex. Poor mobile signal and broadband access still inhibit productivity for home-based workers and rural enterprises.
- **Address ageing business premises** on high streets and farm holdings. Many buildings are energy-inefficient or inflexible for modern needs. South Downs National Park Authority could work with local authorities and property owners to champion low-carbon retrofitting that respects heritage while enabling future economic use.
- **Support community-level workspace solutions**, including co-working hubs in market towns and underused public or church buildings, to help freelancers and small enterprises stay local.

Opportunities

2. Back low-carbon, place-based growth

- **Spotlight rural manufacturing as a hidden strength.** Long-established firms – especially in engineering, food production, and artisan making – offer low-transport, net-zero-aligned models. South Downs National Park Authority could collaborate with emerging mayoral combined authorities to position these as flagship ‘green industry’ case studies.
- **Encourage regenerative business models,** from Downland wool insulation to vineyard-based ecotourism. The National Park is already home to quiet innovation – these models need visibility, peer learning, and investment pathways.
- **Create planning frameworks for discreet rural enterprise hubs.** With careful siting and sustainability conditions, retrofitted barns or redundant farm sites could support emerging sectors like repair services, conservation tech, and sustainable packaging.
- **Continue embedding carbon and biodiversity metrics** into Local Plan revisions and investment decisions, reinforcing the National Park’s leadership in climate-positive development.

3. Invest in skills and future workforce pathways

- **Bridge the urban-rural training gap** by supporting partnerships between rural employers and further/higher education providers. Land management, retrofit, food processing, and tourism all need tailored, locally rooted skills provision.
- **Support succession planning** in family-run farms, makerspaces, and rural trades. Many small businesses risk closure if intergenerational handover isn’t supported through mentoring, apprenticeships, or flexible finance.
- **Make better use of the Park’s well-qualified population,** ensuring that skilled professionals (including older adults and career changers) can contribute to emerging green sectors and community resilience initiatives.
- **Champion inclusive opportunity,** ensuring that young people and low-income residents can afford to live and work in the National Park. Affordability and access to secure work remain a barrier to sustaining a thriving, diverse rural economy.

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