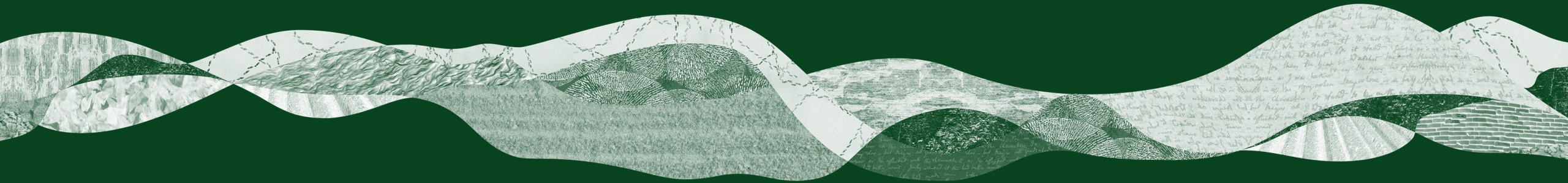


# SOUTH DOWNS NATIONAL PARK

## Economic Profile 2025 Part 2



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# INTRODUCTION

This report is Part 2 of a two-part economic profile of the South Downs National Park (SDNP) and should be read in conjunction with Part 1.

Part 1 presents headline indicators, summary findings, sector-specific narratives and strategic recommendations. Part 2 serves as the accompanying data presentation. It brings together the full range of economic indicators that underpin the insights in Part 1 and provides breakdowns across business structure, employment, productivity, sector composition and population trends.

The report offers a time series dataset that primarily spans 2020 - 2024, but with a longitudinal perspective spanning the period 2016 to 2024.

This is to provide comparison over almost a decade of activity while also benchmarking against neighbouring local authority areas, the wider South East region, and other English National Parks where available.

In 2018 and 2020, the South Downs National Park Authority published its first economic profiles to inform the development of a place-based rural economic strategy.

These earlier reports helped shape policy and investment priorities, providing an evidence base for engagement with partners and stakeholders. This latest edition updates that foundation with the most current data available, offering a clearer picture of how the National Park's economy has evolved — particularly in the face of Covid-19, inflationary shocks and shifting labour markets — and where future opportunities and challenges may lie.

# METHODOLOGY

## DATA SOURCES

This report uses data sourced from publicly available datasets and publications.

The majority of the economic data was collected via Nomis, a service provided by the Office for National Statistics (ONS), the UK's largest independent producer of official statistics<sup>1</sup>. Nomis offers access to population, society, and labour market data at national, regional, and local levels. It was used as the primary source because it allows consistent querying of the South Downs National Park geography alongside comparator areas.

Where data was not available via Nomis, for example, Gross Value Added (GVA), datasets were sourced directly from the ONS website or other official publications.

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[1. NomisWeb](#)

## GEOGRAPHICAL BOUNDARIES

### LOCAL AUTHORITIES AND THE SOUTH EAST REGION

For comparison purposes, the report includes data from the three upper-tier local authorities overlapping the South Downs National Park, as well as the South East region.

- Local authority and the South East region follow the ONS published boundary.
- Figures for each local authority include the parts of the South Downs they cover.

They are the full local authority, not exclusive to the National Park area.

# METHODOLOGY

## SOUTH DOWNS NATIONAL PARK AND COMPARATOR NATIONAL PARKS

This report defines the geography of the South Downs National Park (SDNP) and comparator National Parks using a variant of the Population Weighted Centroid (PWC) 'best-fit' method. The South Downs National Park Authority usually applies its standard PWC (best-fit) methodology for analysis; however, for this study an adapted approach is used to ensure consistency with the data sources and comparator National Parks. The process is outlined below to aid future replication.

1. Official boundaries for the South Downs and other English National Parks were downloaded from the ONS Open Geography Portal<sup>2</sup>.

2. Three geographic levels were sourced for the UK as a whole. They were:
  - Output Areas (OAs)<sup>3</sup>
  - Lower Layer Super Output Areas (LSOAs)<sup>4</sup>
  - Middle Layer Super Output Areas (MSOAs)<sup>5</sup>
3. These were sourced as Population Weighted Centroids from the ONS.
4. Using GIS software, National Park boundaries were overlaid onto each output area centroid map to identify which OAs, LSOAs, and MSOAs fell within the SDNP or comparator parks.

A full list of the Output Areas used for the SDNP boundary definition is provided in the accompanying annex.

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[2. National Parks \(December 2022\) Boundaries GB BFC \(V3\)](#)

[3. Output Areas \(December 2021\) EW Population Weighted Centroids \(V3\)](#)

[4. Lower layer Super Output Areas \(December 2021\) EW Population Weighted Centroids](#)

[5. Middle layer Super Output Areas \(December 2021\) EW Population Weighted Centroids](#)

# METHODOLOGY

## DEFINING THE KNOWLEDGE ECONOMY

The Knowledge Economy is defined as a group of specific sectors within the economy that are knowledge intensive in their activity. They deal extensively with information and their business is all about the distribution or exchange of the information that they hold.

There is no single definitive definition of the Knowledge Economy. For the purposes of this report, the definition from the last South Downs National Park economic update<sup>6</sup> has been used. It is based on a list of 18 broad sectors defined at 2 digit SIC level. A list of the sectors used is in the annexes.

## DEFINING THE VISITOR ECONOMY

The visitor economy (VE) has been defined as ONS subsectors that relate to leisure, tourism, hospitality and other related areas of the economy. For the purposes of this report, the definition from the last South Downs National Park economic update has been used. It is based on a list of 10 broad sectors defined at 2 digit SIC level. 2 digit SIC are used as it is the lowest level that provides data at the OA levels used to define the South Downs National Park area. A list of the sectors used is in the annexes.

Because of no or very low numbers of businesses in some VE subsectors in the South Downs, Air Transport, Water Transport and Land Transport & Pipelines subsectors have been aggregated into one combined Transport sector in some comparison tables.

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[6. Economic Data Update: South Downs National Park, August 2020](#)

# METHODOLOGY

## DEFINING GROSS VALUE ADDED (GVA)

Gross Value Added (GVA) estimates for the South Downs National Park were modelled using published GVA statistics at district, borough, and city level: the lowest geographic level available from the ONS. To estimate the proportion of each district's GVA attributable to the SDNP, employment data at Lower Layer Super Output Area (LSOA) level was used.

ONS employment totals were taken at LSOA level. Through GIS overlaying, all LSOAs falling within the SDNP boundary were attributed to one district or borough. For each district and borough, the total employment across these SDNP LSOAs was summed. For example, four LSOAs within Arun district fall within the SDNP boundary. The employment for these four LSOAs totalled 3,200 jobs. This figure was then divided by the total published employment for the district (in this case, 50,835

for Arun) to produce the percentage of district employment located within the SDNP. This was 6.29% for Arun. This employment share was subsequently applied to the district's GVA totals to estimate the proportion of GVA occurring within the South Downs National Park.

# METHODOLOGY

## DATA LIMITATIONS AND COMPARABILITY WITH OTHER SOUTH DOWNS NATIONAL PARK AUTHORITY REPORTS

This report draws primarily on national datasets produced by the Office for National Statistics (ONS) to provide a consistent, repeatable picture of the South Downs National Park and comparator areas. Business counts are based on the Inter-Departmental Business Register (IDBR), which includes primarily only businesses that have VAT or PAYE records. As a result, it will tend to under-represent very small firms and sole traders, and sector data are sensitive to how businesses classify themselves using Standard Industrial Classification (SIC) codes, particularly where activity spans multiple sectors (for example, food, drink and accommodation).

Employment data are taken from the Annual Population Survey, a UK-wide survey that uses weighted modelling to create local estimates. This makes it valuable for comparisons over time and across areas – the aim of this report – but it smooths out very local variations and will not capture small clusters or niche sector activity.

Because of these characteristics, some figures in this report will not match totals reported in the South Downs National Park Authority's other sector-specific studies, such as the [Visitor Accommodation Reviews](#) and [The Viticulture Growth Impact Assessment](#). Those studies include research and direct measurement of sector activity at a granular, local level, and should be regarded as the primary source for detailed analysis of individual sectors.

Reflecting these limitations and the disclosure controls applied to ONS data, small numbers in the business and employment tables should be treated as indicative, as counts are rounded. Where the ONS source gives a zero we use “–” to denote that the value is not reliably estimable, rather than to imply that it is zero.

# BUSINESS DEMOGRAPHY



# BUSINESS DEMOGRAPHY

## BUSINESS POPULATION AND GROWTH

With 5,980 businesses in total, the business population of the South Downs National Park is down -1.5 percent since 2016 and -2.9 percent since 2019 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 (table 1).

The year-on-year trend (Figure 2) shows that the South Downs closely tracks the South East average, while sitting below East and West Sussex and other national park comparators.

# BUSINESS DEMOGRAPHY

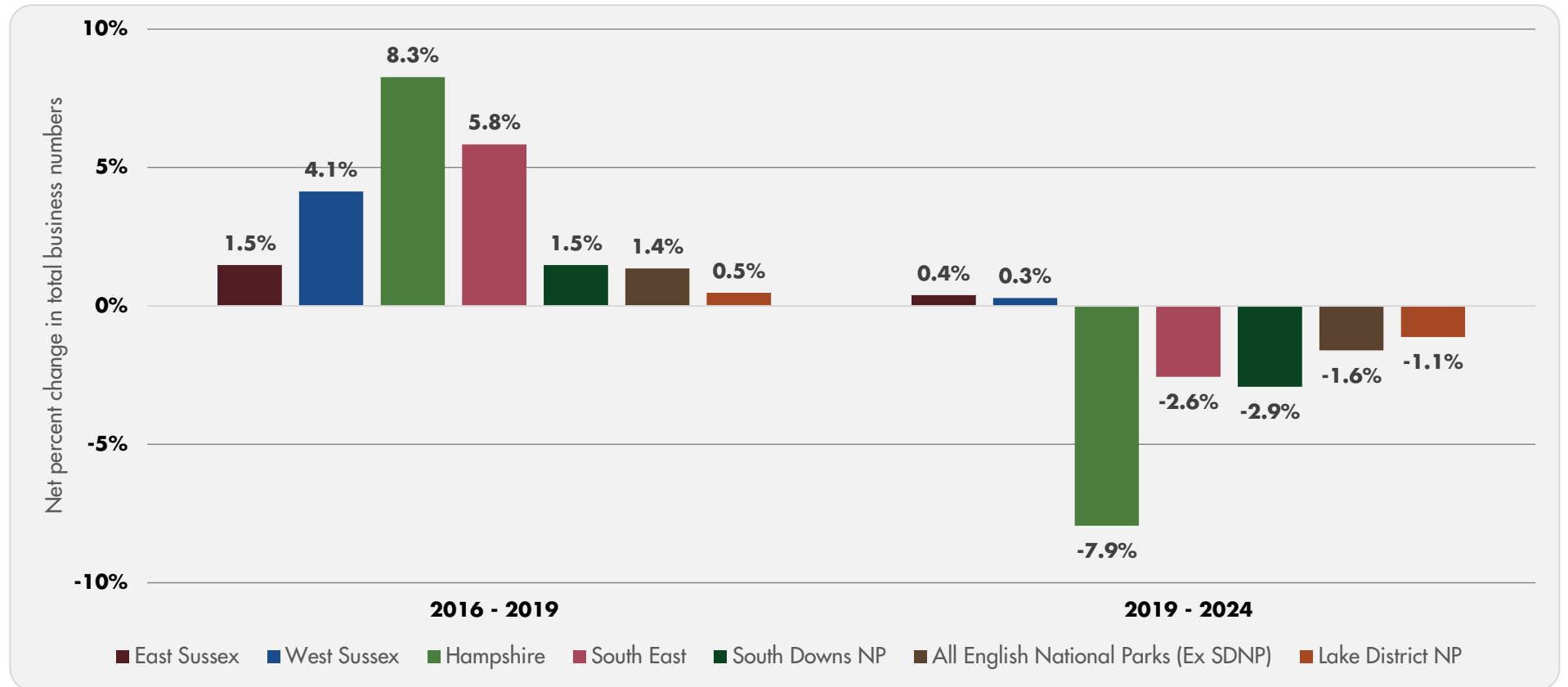
Table 1: Total number of businesses in the South Downs National Park and comparator areas 2016 – 2024 <sup>7</sup>

| Year        | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|-------------|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| <b>2016</b> | 22,560      | 35,265      | 58,715    | 392,085    | <b>6,070</b>   | 12,975                               | 3,115            |
| <b>2017</b> | 22,855      | 36,370      | 60,765    | 403,680    | <b>6,120</b>   | 13,035                               | 3,110            |
| <b>2018</b> | 22,905      | 36,295      | 61,145    | 404,555    | <b>6,110</b>   | 13,100                               | 3,125            |
| <b>2019</b> | 22,895      | 36,720      | 63,570    | 414,975    | <b>6,160</b>   | 13,150                               | 3,130            |
| <b>2020</b> | 23,135      | 36,840      | 63,010    | 418,370    | <b>6,080</b>   | 13,090                               | 3,130            |
| <b>2021</b> | 23,335      | 37,325      | 62,020    | 420,185    | <b>6,040</b>   | 12,885                               | 3,090            |
| <b>2022</b> | 23,185      | 37,380      | 60,200    | 412,650    | <b>6,100</b>   | 13,070                               | 3,130            |
| <b>2023</b> | 23,015      | 36,895      | 58,880    | 404,840    | <b>5,995</b>   | 12,945                               | 3,105            |
| <b>2024</b> | 22,985      | 36,825      | 58,520    | 404,360    | <b>5,980</b>   | 12,940                               | 3,095            |

7. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

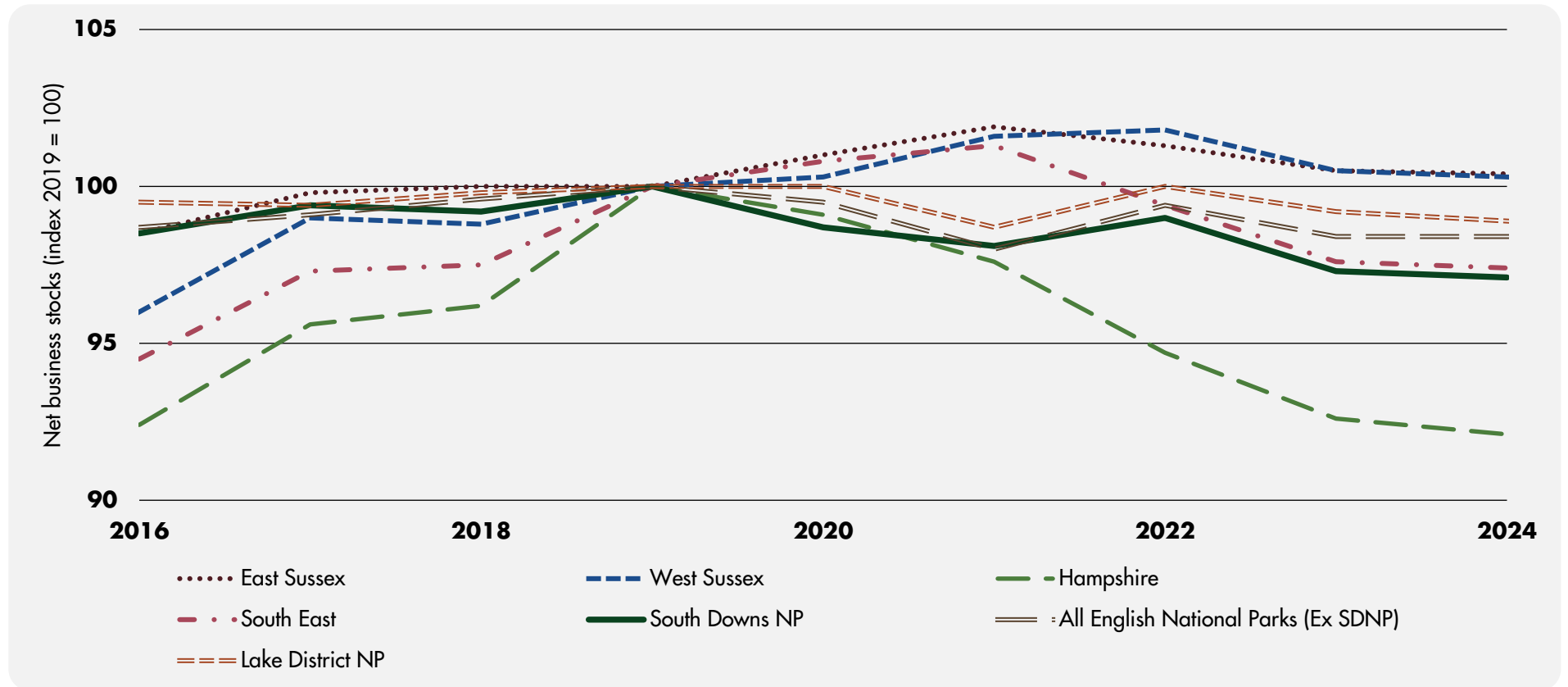
Figure 1 - Change in the total number of businesses in the South Downs National Park and comparator areas 2016-2019 & 2019-2024<sup>8</sup>



8. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

Figure 2 - Year on year change in total net business counts (index 2019 = 100) <sup>9</sup>



9. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

## SIZE OF BUSINESS

The South Downs National Park continues to reflect a business structure that is distinctly rural and micro-scale. 90.5% of businesses here employ fewer than 10 people, placing it just above the proportions seen in East Sussex (90.3%), West Sussex (89.4%) and the broader South East region (89.6%). See Table 2.

In terms of turnover, the SDNP aligns with wider national park patterns but sits below the regional average when it comes to higher-revenue businesses. 82% of firms in the South Downs report turnovers below £500,000, comparable to East and West Sussex, but with a slightly lower proportion (9.5%) exceeding £1 million in revenue compared to 11.0% in the South East as a whole.

This supports a picture of the South Downs' business base being largely composed of low-to-moderate revenue firms, with fewer medium or large-scale operations contributing significantly to overall turnover.

While the data presents a coherent picture of a microbusiness economy, it also highlights the structural limits on business scale within the SDNP. The small number of high-turnover and medium-to-large firms may reflect constraints related to planning or infrastructure. However, it could also suggest that South Downs' economy thrives in offering niche, high-value, low-volume services, especially relevant in sectors like consultancy, food and drink, or visitor services.

# BUSINESS DEMOGRAPHY

Table 2 - Number and percentages of businesses in each employment size band in 2024 for the South Downs National Park and comparator areas<sup>10</sup>

|   | Micro (0 to 9) |              | Small (10 to 49) |             | Medium-sized (50 to 249) |             | Large (250+) |             |
|---|----------------|--------------|------------------|-------------|--------------------------|-------------|--------------|-------------|
|   | No.            | %            | No.              | %           | No.                      | %           | No.          | %           |
| <b>East Sussex</b>                          | 20,765         | 90.3%        | 1,865            | 8.1%        | 305                      | 1.3%        | 50           | 0.2%        |
| <b>West Sussex</b>                          | 32,935         | 89.4%        | 3,200            | 8.7%        | 550                      | 1.5%        | 135          | 0.4%        |
| <b>Hampshire</b>                            | 51,495         | 88.0%        | 5,845            | 10.0%       | 960                      | 1.6%        | 220          | 0.4%        |
| <b>South East</b>                           | 362,215        | 89.6%        | 34,240           | 8.5%        | 6,235                    | 1.5%        | 1,670        | 0.4%        |
| <b>South Downs NP</b>                       | <b>5,410</b>   | <b>90.5%</b> | <b>480</b>       | <b>8.0%</b> | <b>70</b>                | <b>1.2%</b> | <b>20</b>    | <b>0.3%</b> |
| <b>All English National Parks (Ex SDNP)</b> | 11,630         | 89.9%        | 1,145            | 8.8%        | 135                      | 1.0%        | 30           | 0.2%        |
| <b>Lake District NP</b>                     | 2,685          | 86.8%        | 350              | 11.3%       | 50                       | 1.6%        | 10           | 0.3%        |

10. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

Table 3 - Number and percentages of businesses in each turnover band in 2024 for the South Downs National Park and comparator areas<sup>11</sup>

|   | <£100k       |              | £100k-£499k  |              | £0.5m to £1m |             | >£1m       |             |
|---|--------------|--------------|--------------|--------------|--------------|-------------|------------|-------------|
|   | No.          | %            | No.          | %            | No.          | %           | No.        | %           |
| <b>East Sussex</b>                          | 7,890        | 33.9%        | 11,425       | 49.1%        | 1,840        | 7.9%        | 2,115      | 9.1%        |
| <b>West Sussex</b>                          | 12,265       | 33.1%        | 17,645       | 47.6%        | 3,225        | 8.7%        | 3,920      | 10.6%       |
| <b>Hampshire</b>                            | 19,045       | 32.5%        | 27,175       | 46.4%        | 5,190        | 8.9%        | 7,155      | 12.2%       |
| <b>South East</b>                           | 134,095      | 33.3%        | 190,710      | 47.3%        | 33,805       | 8.4%        | 44,355     | 11.0%       |
| <b>South Downs NP</b>                       | <b>1,955</b> | <b>33.1%</b> | <b>2,885</b> | <b>48.9%</b> | <b>505</b>   | <b>8.6%</b> | <b>560</b> | <b>9.5%</b> |
| <b>All English National Parks (Ex SDNP)</b> | 3,970        | 33.6%        | 5,795        | 49.0%        | 1,045        | 8.8%        | 1,015      | 8.6%        |
| <b>Lake District NP</b>                     | 950          | 32.4%        | 1,420        | 48.5%        | 280          | 9.6%        | 280        | 9.6%        |

11. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

## BUSINESS BIRTHS AND DEATHS

Since 2016, new business formation in the South Downs National Park has followed a downward trend. As the table 4 shows, in 2021 it saw a proportionally higher rate of new business creation than the wider South East, triggered by Covid-19 upheaving working patterns. This suggests the South Downs offers a comparatively supportive environment for entrepreneurs looking to start up in a rural, high-quality setting.

## SECTORAL BREAKDOWN

The South Downs National Park's business base remains notably more aligned with the South East region than with other National Parks (table 5 and figure 4). Professional, scientific and technical services make up the largest share of businesses at 20.1% in 2024 (1,200 businesses), giving SDNP the highest proportion of this sector among the comparators. Construction (13.4%) and business administration and support services (9.1%) have the second and third largest share of businesses mirroring the South East regional pattern more closely than the agriculture and tourism led profiles typical of other National Parks.

# BUSINESS DEMOGRAPHY

Table 4 - Percentage of businesses in each employment size and turnover band in 2024<sup>12</sup>

| Year        | East Sussex                 |                                      | West Sussex                 |                                      | Hampshire                   |                                      | South East                  |                                      | South Downs NP              |                                      |
|-------------|-----------------------------|--------------------------------------|-----------------------------|--------------------------------------|-----------------------------|--------------------------------------|-----------------------------|--------------------------------------|-----------------------------|--------------------------------------|
|             | No. New Businesses Annually | New Businesses as % Total Businesses | No. New Businesses Annually | New Businesses as % Total Businesses | No. New Businesses Annually | New Businesses as % Total Businesses | No. New Businesses Annually | New Businesses as % Total Businesses | No. New Businesses Annually | New Businesses as % Total Businesses |
| <b>2016</b> | 2,590                       | 11%                                  | 4,645                       | 13%                                  | 8,325                       | 14%                                  | 55,955                      | 14%                                  | <b>761</b>                  | <b>13%</b>                           |
| <b>2017</b> | 2,415                       | 11%                                  | 4,265                       | 12%                                  | 7,500                       | 12%                                  | 51,580                      | 13%                                  | <b>730</b>                  | <b>12%</b>                           |
| <b>2018</b> | 2,100                       | 9%                                   | 3,890                       | 11%                                  | 7,750                       | 13%                                  | 49,540                      | 12%                                  | <b>662</b>                  | <b>11%</b>                           |
| <b>2019</b> | 2,425                       | 11%                                  | 3,900                       | 11%                                  | 7,530                       | 12%                                  | 51,560                      | 12%                                  | <b>684</b>                  | <b>11%</b>                           |
| <b>2020</b> | 2,450                       | 11%                                  | 4,025                       | 11%                                  | 6,315                       | 10%                                  | 47,685                      | 11%                                  | <b>659</b>                  | <b>11%</b>                           |
| <b>2021</b> | 2,385                       | 10%                                  | 4,250                       | 11%                                  | 6,270                       | 10%                                  | 48,375                      | 12%                                  | <b>816</b>                  | <b>14%</b>                           |
| <b>2022</b> | 2,185                       | 9%                                   | 3,745                       | 10%                                  | 5,700                       | 9%                                   | 44,160                      | 11%                                  | <b>762</b>                  | <b>12%</b>                           |
| <b>2023</b> | 2,145                       | 9%                                   | 3,670                       | 10%                                  | 5,655                       | 10%                                  | 42,955                      | 11%                                  | <b>701</b>                  | <b>12%</b>                           |

12. Nomis: Business demography, UK: Annual change in the number of UK businesses broken down by sector of the economy 2023

# BUSINESS DEMOGRAPHY

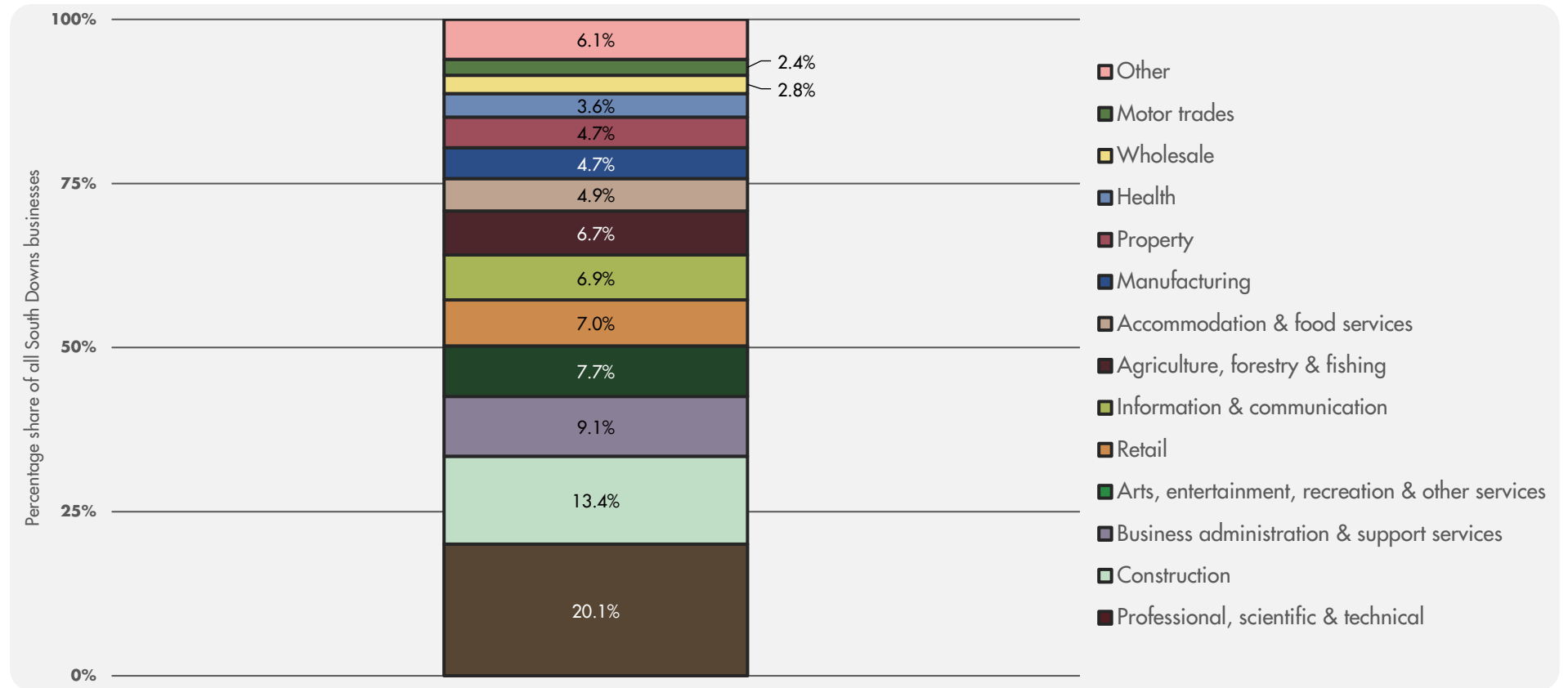
Table 5 – Number of businesses by broad industrial group 2024, ordered by most common in the South Downs<sup>13</sup>

| Industry   | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|--|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| Professional, scientific & technical             | 3,525       | 6,230       | 10,275    | 71,545     | <b>1,200</b>   | 1,315                                | 255              |
| Construction                                     | 3,960       | 5,835       | 9,695     | 62,510     | <b>800</b>     | 1,265                                | 295              |
| Business administration & support services       | 1,955       | 3,455       | 4,965     | 36,335     | <b>545</b>     | 730                                  | 190              |
| Arts, entertainment, recreation & other services | 1,670       | 2,615       | 3,790     | 27,830     | <b>460</b>     | 635                                  | 165              |
| Retail   | 1,725       | 2,545       | 4,425     | 28,360     | <b>420</b>     | 860                                  | 255              |
| Information & communication                      | 1,435       | 2,675       | 4,670     | 36,130     | <b>410</b>     | 425                                  | 70               |
| Agriculture, forestry & fishing                  | 1,270       | 1,255       | 1,855     | 10,915     | <b>400</b>     | 3,500                                | 675              |
| Accommodation & food services                    | 1,535       | 1,995       | 2,705     | 21,310     | <b>295</b>     | 1,460                                | 590              |
| Manufacturing                                    | 1,215       | 1,855       | 3,130     | 17,980     | <b>280</b>     | 565                                  | 120              |
| Property   | 875         | 1,445       | 2,335     | 16,050     | <b>280</b>     | 490                                  | 135              |
| Health   | 930         | 1,465       | 2,280     | 16,145     | <b>215</b>     | 335                                  | 65               |
| Wholesale  | 745         | 1,365       | 1,980     | 13,740     | <b>165</b>     | 305                                  | 65               |
| Motor trades                                     | 725         | 1,100       | 1,840     | 11,645     | <b>145</b>     | 285                                  | 45               |
| Transport & storage (inc postal)                 | 445         | 1,270       | 1,895     | 14,560     | <b>105</b>     | 240                                  | 35               |
| Education  | 440         | 690         | 1,085     | 7,830      | <b>105</b>     | 190                                  | 50               |
| Financial & insurance                            | 340         | 700         | 1,125     | 8,280      | <b>100</b>     | 130                                  | 25               |
| Public administration & defence                  | 85          | 105         | 205       | 1,255      | <b>35</b>      | 130                                  | 40               |
| Mining, quarrying & utilities                    | 115         | 220         | 260       | 1,940      | <b>20</b>      | 65                                   | 10               |

13. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

Figure 3 – Share of businesses in the South Downs National Park in 2024. <sup>14 15</sup>

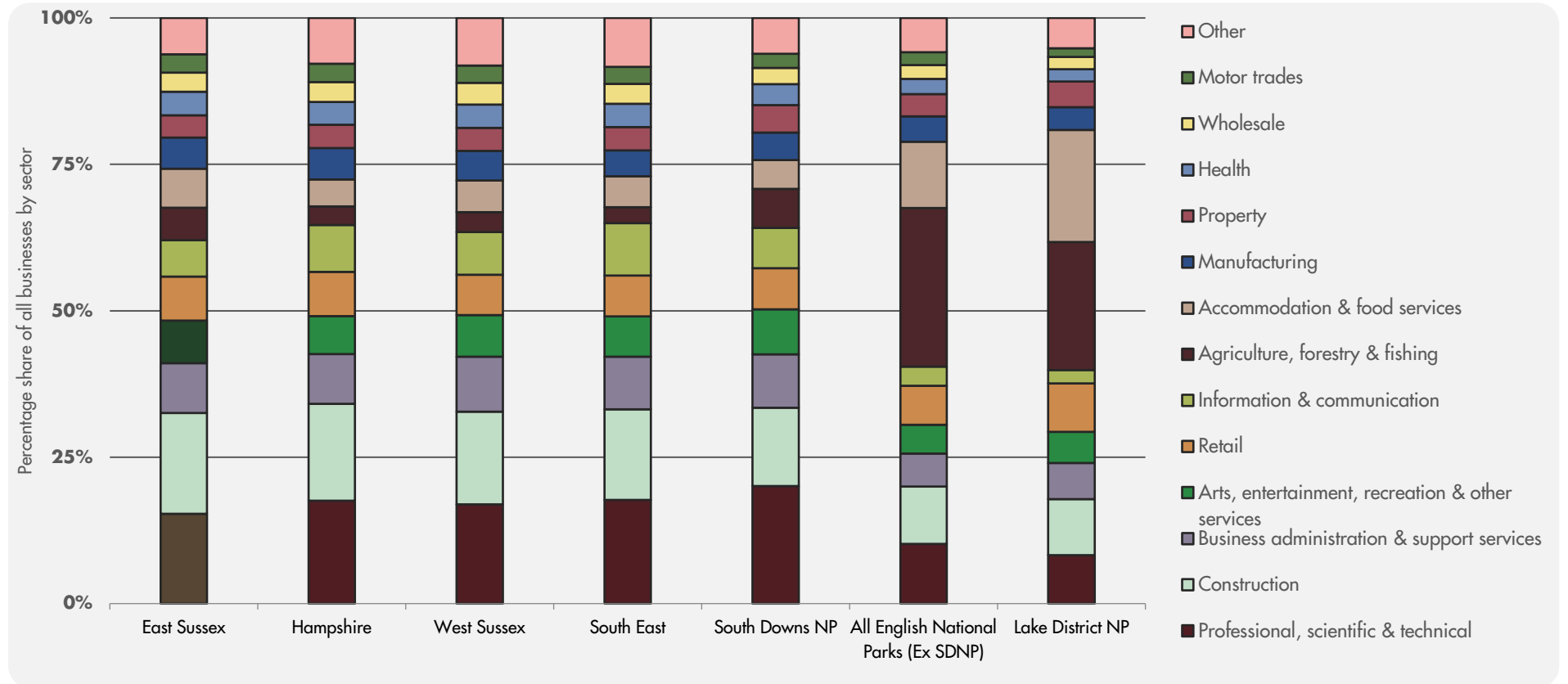


14. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

15. The top 13 most prevalent sectors are listed. Sectors with less than 10% share of businesses have been combined into Other. These are Transport & storage; Education; Financial & insurance; Public administration & defence; Mining, quarrying & utilities

# BUSINESS DEMOGRAPHY

Figure 4 – Distribution of sectors by percentage share of businesses for South Downs National Park and comparator areas in 2024. <sup>16 17</sup>



16. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

17. The top 13 most prevalent sectors in the South Downs National Park are listed. The remaining businesses have been combined into Other. These are Transport & storage, Education, Financial & insurance, Public administration & defence, Mining, quarrying & utilities

# BUSINESS DEMOGRAPHY

## SECTORAL BREAKDOWN

Between 2016 and 2024, the overall sectoral profile has remained relatively stable, with only minor shifts in business counts as shown in Table 6. The most notable change is the decline in Information & Communication, falling from 470 businesses in 2020 to 410 in 2024 (from 7.7% to 6.9% share of all businesses). This decline contrasts with more urban areas of the South East such as Hampshire and may reflect wider market consolidation or relocations toward denser digital clusters. Property-related businesses have grown from 4.3% (2020) to 4.7% (2024), and construction from 12.8% to 13.4%. However, most other sectors have been flat.

As figure 5 shows, the 1.9% decline in business numbers since 2016 is spread across sectors, with no specific part of the economy seeing a sharp change in

business numbers. It is comparable with other national parks (figure 6), but without one dominant sector, and more stable than the South East (figure 7).

# BUSINESS DEMOGRAPHY

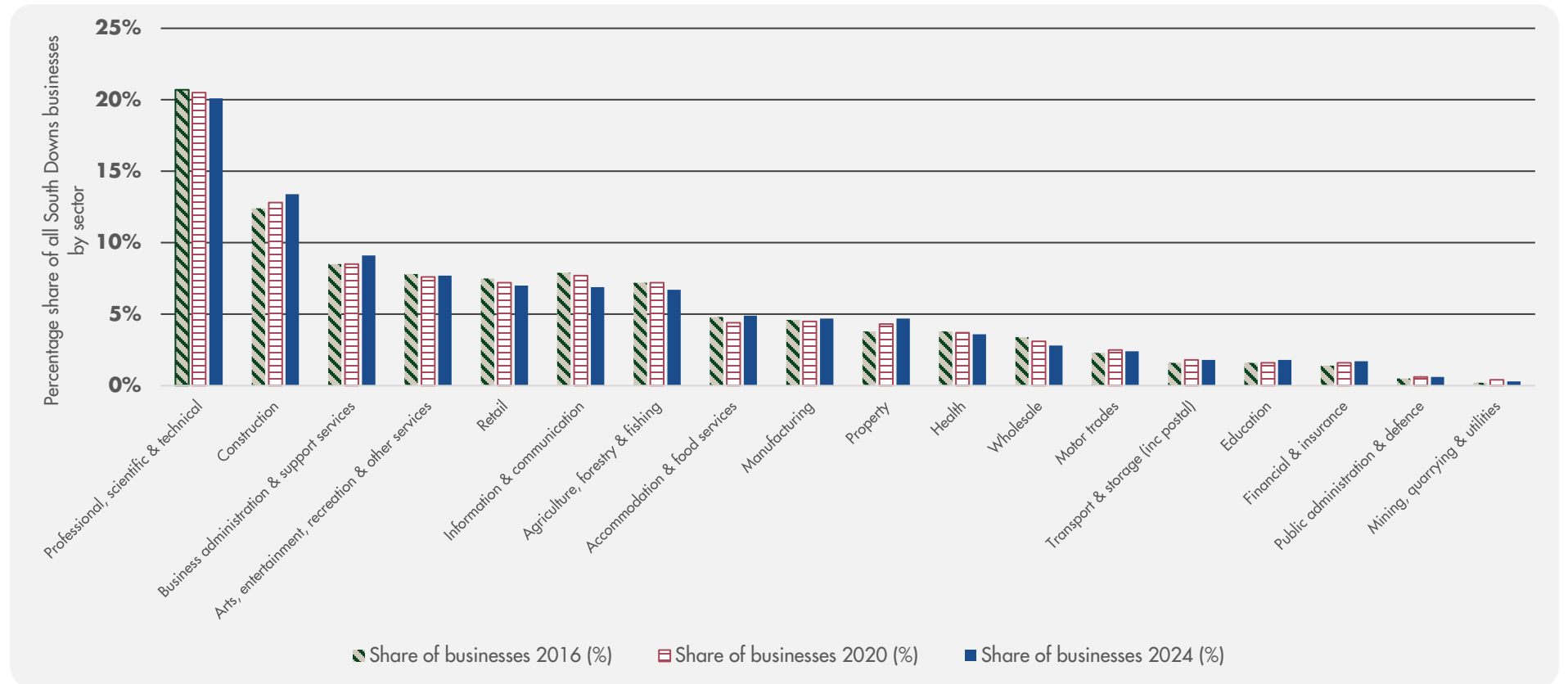
Table 6 – Number and percentage share of businesses by sector in the South Downs National Park 2016, 2020 & 2024 <sup>18</sup>

| Industry   | No. businesses 2016 | No. businesses 2020 | No. businesses 2024 | % share of businesses 2016 | % share of businesses 2020 | % share of businesses 2024 |
|--|---------------------|---------------------|---------------------|----------------------------|----------------------------|----------------------------|
| Professional, scientific & technical             | 1255                | 1245                | 1200                | 20.7%                      | 20.5%                      | 20.1%                      |
| Construction                                     | 750                 | 780                 | 800                 | 12.4%                      | 12.8%                      | 13.4%                      |
| Business administration & support services       | 515                 | 515                 | 545                 | 8.5%                       | 8.5%                       | 9.1%                       |
| Arts, entertainment, recreation & other services | 475                 | 465                 | 460                 | 7.8%                       | 7.6%                       | 7.7%                       |
| Retail   | 455                 | 435                 | 420                 | 7.5%                       | 7.2%                       | 7.0%                       |
| Information & communication                      | 480                 | 470                 | 410                 | 7.9%                       | 7.7%                       | 6.9%                       |
| Agriculture, forestry & fishing                  | 440                 | 440                 | 400                 | 7.2%                       | 7.2%                       | 6.7%                       |
| Accommodation & food services                    | 290                 | 265                 | 295                 | 4.8%                       | 4.4%                       | 4.9%                       |
| Manufacturing                                    | 280                 | 275                 | 280                 | 4.6%                       | 4.5%                       | 4.7%                       |
| Property   | 230                 | 260                 | 280                 | 3.8%                       | 4.3%                       | 4.7%                       |
| Health   | 230                 | 225                 | 215                 | 3.8%                       | 3.7%                       | 3.6%                       |
| Wholesale  | 205                 | 190                 | 165                 | 3.4%                       | 3.1%                       | 2.8%                       |
| Motor trades                                     | 140                 | 150                 | 145                 | 2.3%                       | 2.5%                       | 2.4%                       |
| Transport & storage (inc postal)                 | 95                  | 110                 | 105                 | 1.6%                       | 1.8%                       | 1.8%                       |
| Education  | 100                 | 100                 | 105                 | 1.6%                       | 1.6%                       | 1.8%                       |
| Financial & insurance                            | 85                  | 95                  | 100                 | 1.4%                       | 1.6%                       | 1.7%                       |
| Public administration & defence                  | 30                  | 35                  | 35                  | 0.5%                       | 0.6%                       | 0.6%                       |
| Mining, quarrying & utilities                    | 15                  | 25                  | 20                  | 0.2%                       | 0.4%                       | 0.3%                       |

18. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

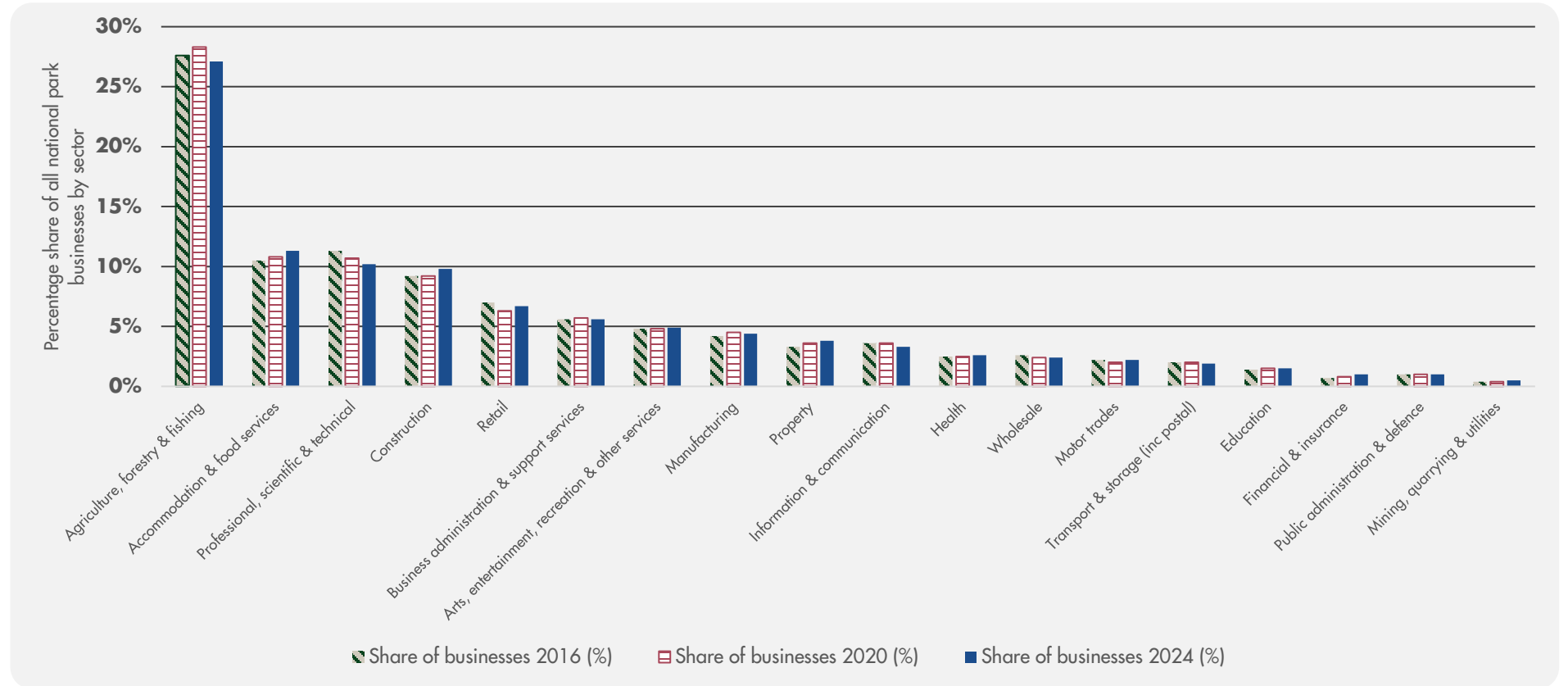
Figure 5 – Change in percentage share of businesses by sector in the South Downs National Park 2016, 2020 & 2024 <sup>19</sup>



19. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

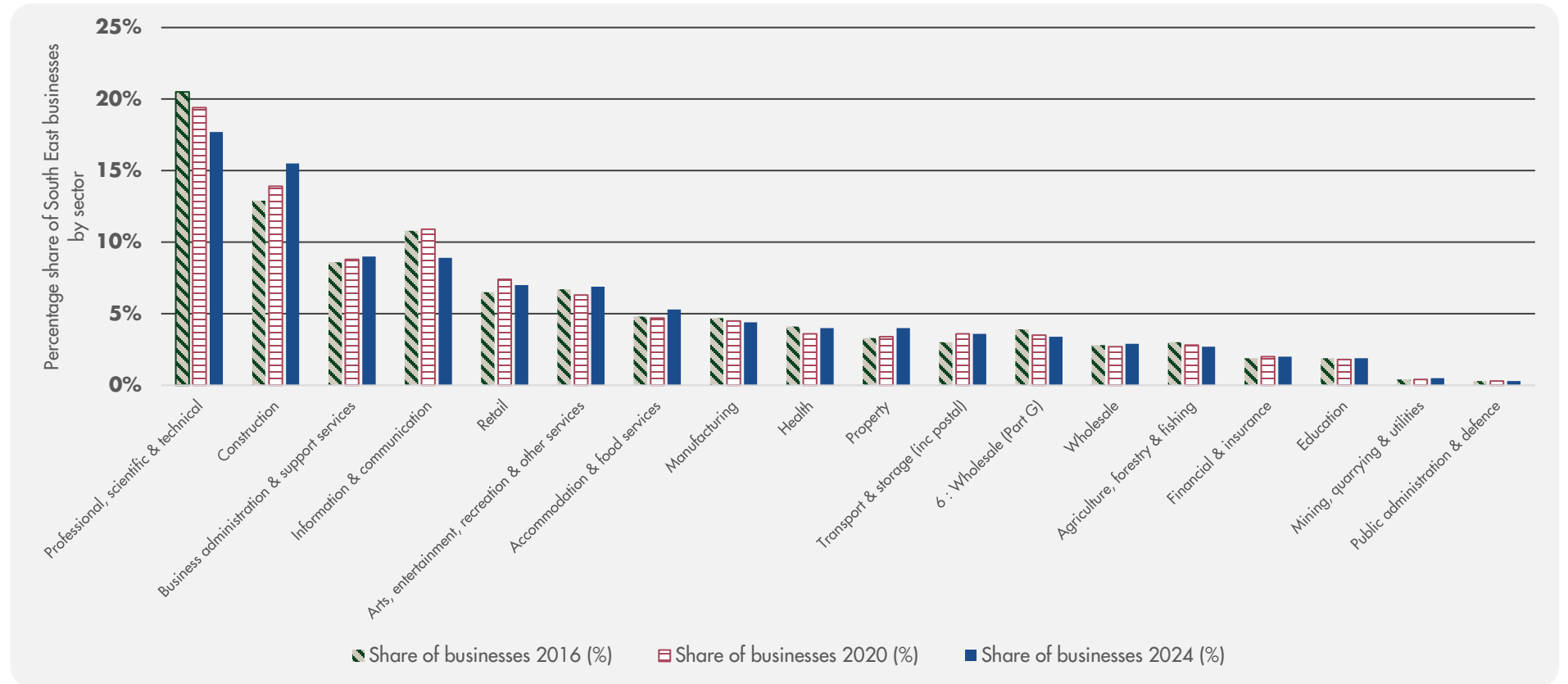
Figure 6 – Change in percentage share of businesses by sector in All English National Parks (Ex SDNP) 2016, 2020 & 2024 <sup>20</sup>



20. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# BUSINESS DEMOGRAPHY

Figure 7 – Change in percentage share of businesses by sector in the South East 2016, 2020 & 2024 <sup>21</sup>



21. Nomis: UK Business Counts - enterprises by industry and employment size band 2024

# THE KNOWLEDGE ECONOMY



# THE KNOWLEDGE ECONOMY

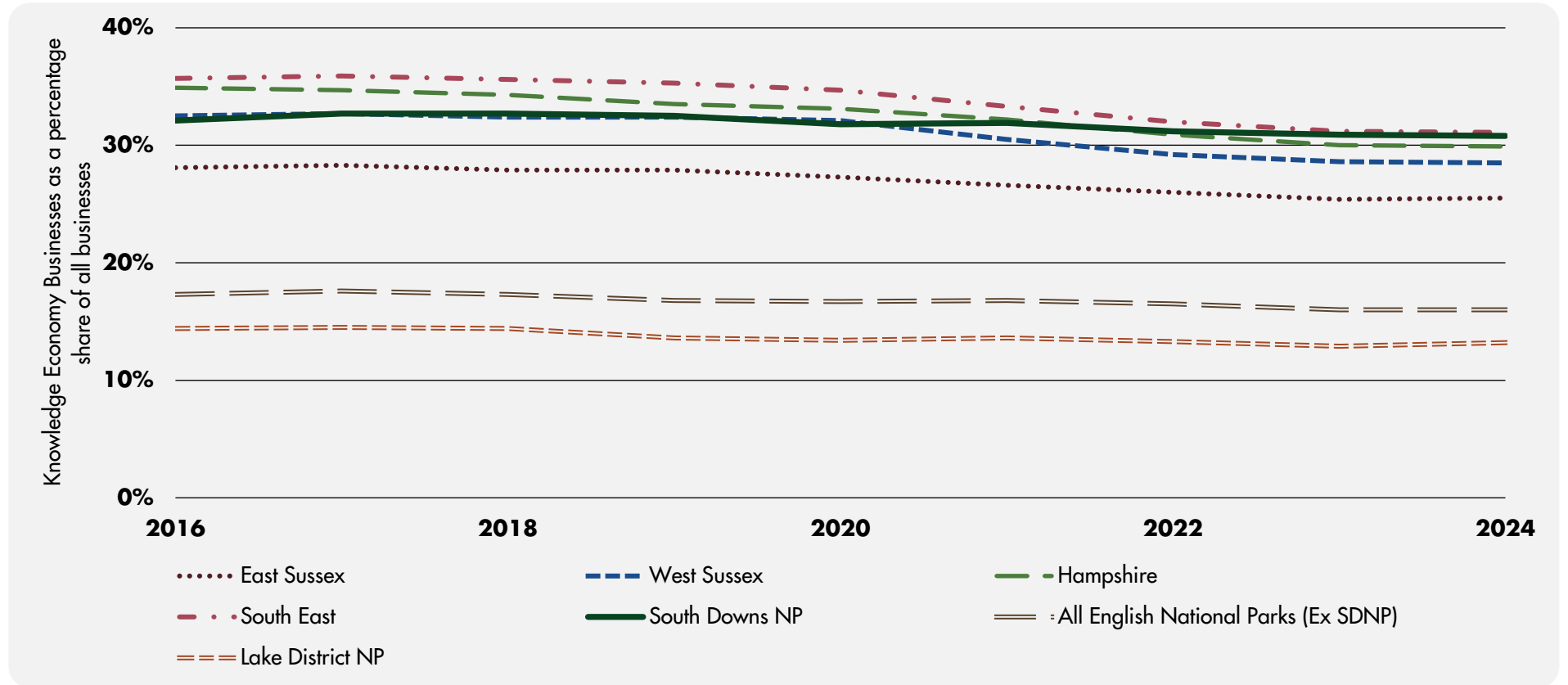
The knowledge economy (KE) comprises those industries whose main purpose centres on knowledge or information, from highly technical engineering and knowledge intensive services such as financial services to creative industries.

The South Downs National Park continues to have a relatively high concentration of KE businesses, with 1,840 firms falling into that designation in 2024, accounting for 30.8% of all businesses. While this is a respectable share, the proportion has declined slightly from 2020 to 2024 by 1.0 percent (figure 8). This is better than the trend seen across the South East (-3.6%) and about in line with other national parks (-0.7%).

The KE landscape in SDNP is dominated by a narrow set of sectors. Within the eighteen subsectors that are included in the knowledge economy, the top three subsectors account for 55.7% of KE businesses in the South Downs National Park (Figure 9 and table 7). These are Activities of head offices, management consultancy activities, Other professional, scientific and technical activities, and Computer programming, consultancy and related activities.

# THE KNOWLEDGE ECONOMY

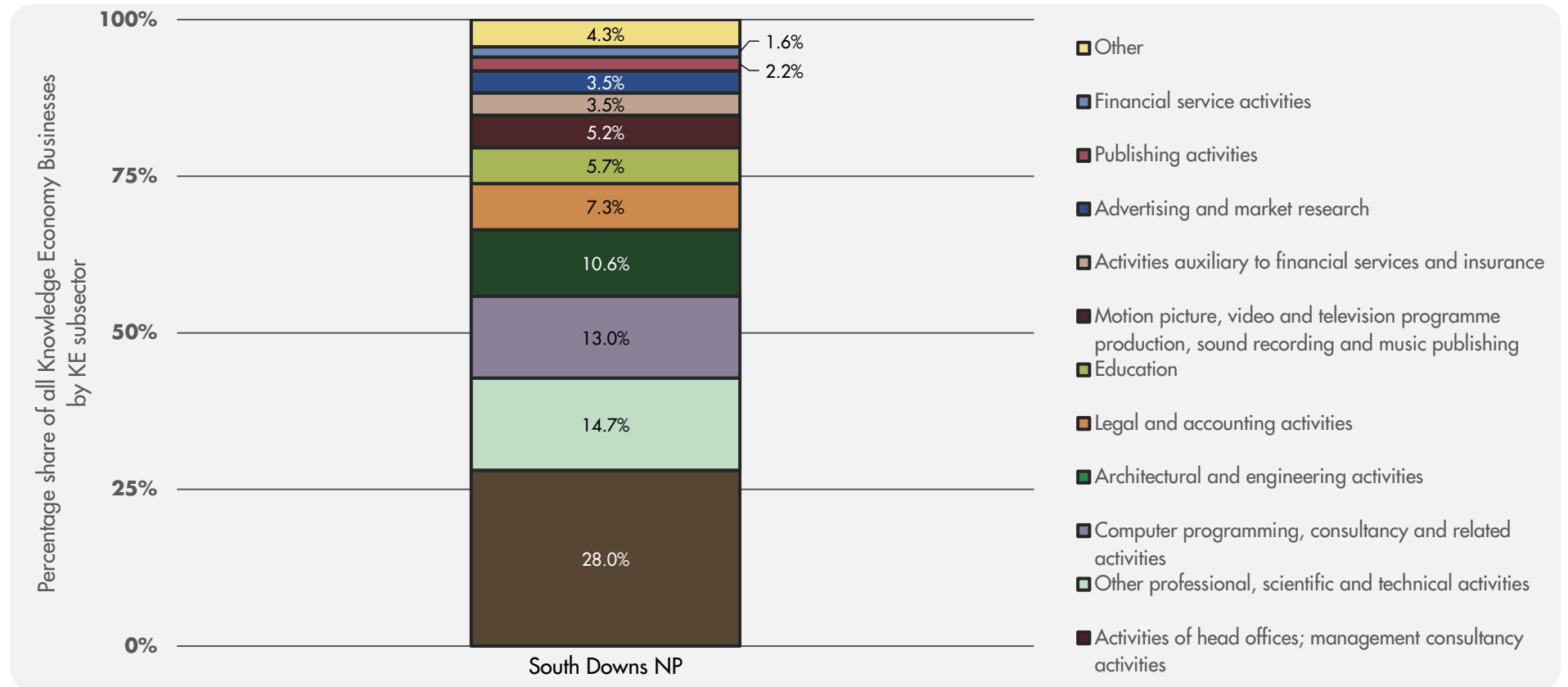
Figure 8 – Percentage of Knowledge Economy businesses as a percentage of total businesses 2016 to 2024<sup>22</sup>



22. Nomis: UK Business Counts - enterprises by industry and employment size band 2024. Filtered by 18 Knowledge Economy 2 digit SICs

# THE KNOWLEDGE ECONOMY

Figure 9 – Share of knowledge economy by sub sector in south downs national park 2024<sup>23 24</sup>



23. Nomis: UK Business Counts - enterprises by industry and employment size band 2024. Filtered by 18 Knowledge Economy 2 digit SICs

24. The top 11 SIC sectors by number of businesses are shown. The remaining seven are aggregates as 'other'. They are: Printing and reproduction of recorded media; Information service activities; Manufacture of computer, electronic and optical products; Scientific research and development; Programming and broadcasting activities; Telecommunications; Insurance, reinsurance and pension funding

# THE KNOWLEDGE ECONOMY

Table 7 – Top 3 Knowledge Economy sector by share of business counts 2024 in the South Downs National Park and comparator areas <sup>25 26</sup>

Activities of head offices and management consultancy represent 28% of all KE businesses. This is higher than all other comparators suggesting the South Downs remains attractive to small-scale, professional advisory firms (table 7). In contrast, computer programming and IT-related services compare less competitively with the local region, comprising just 13% of KE firms compared with 20% in the South East.

| Knowledge Economy sector  | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|---|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| <b>Activities of head offices; management consultancy activities</b>            | 23.2%       | 24.5%       | 24.7%     | 24.3%      | <b>28.0%</b>   | 23.9%                                | 24.4%            |
| <b>Other professional, scientific and technical activities</b>                  | 12.6%       | 11.0%       |           |            | <b>14.7%</b>   |                                      | 14.6%            |
| <b>Computer programming, consultancy and related activities</b>                 | 13.6%       | 16.4%       | 19.7%     | 20.0%      | <b>13.0%</b>   | 12.3%                                |                  |
| <b>Architectural and engineering activities; technical testing and analysis</b> |             |             | 12.2%     | 10.2%      |                | 14.5%                                | 12.2%            |

25. Nomis: UK Business Counts - enterprises by industry and employment size band 2024. Filtered by 18 Knowledge Economy 2 digit SICs

26. Sectors highlighted in 'gold' for largest subsector, 'silver' for second largest and 'bronze' for third largest subsector by share

# THE VISITOR ECONOMY



# THE VISITOR ECONOMY

Measuring the visitor economy business as a proportion of all businesses shows that the South Downs National Park has maintained a broadly steady share (table 8). It is 10.4% in 2024, up a little from 10% in 2016 and 9.8% in 2020. The share closely matches that of West Sussex and the South East and trends higher than Hampshire (9.1% in 2024) and lower than E Sussex (11.4% in 2024). All South East areas and the South Downs National Park have a notably lower share than either the other English National Parks and The Lake District where the tourism and leisure in particular are bigger slices of the economy.

Subsector data show that food and beverage services dominate the visitor economy in the South Downs, comprising 265 businesses out of a total of 620 in 2024. This is followed by creative, arts and entertainment (125), sports and recreation (100), and transport services (60) (table 9 and figure 10).

# THE VISITOR ECONOMY

Table 8 – Visitor economy businesses as a percentage of all businesses 2016 – 2024

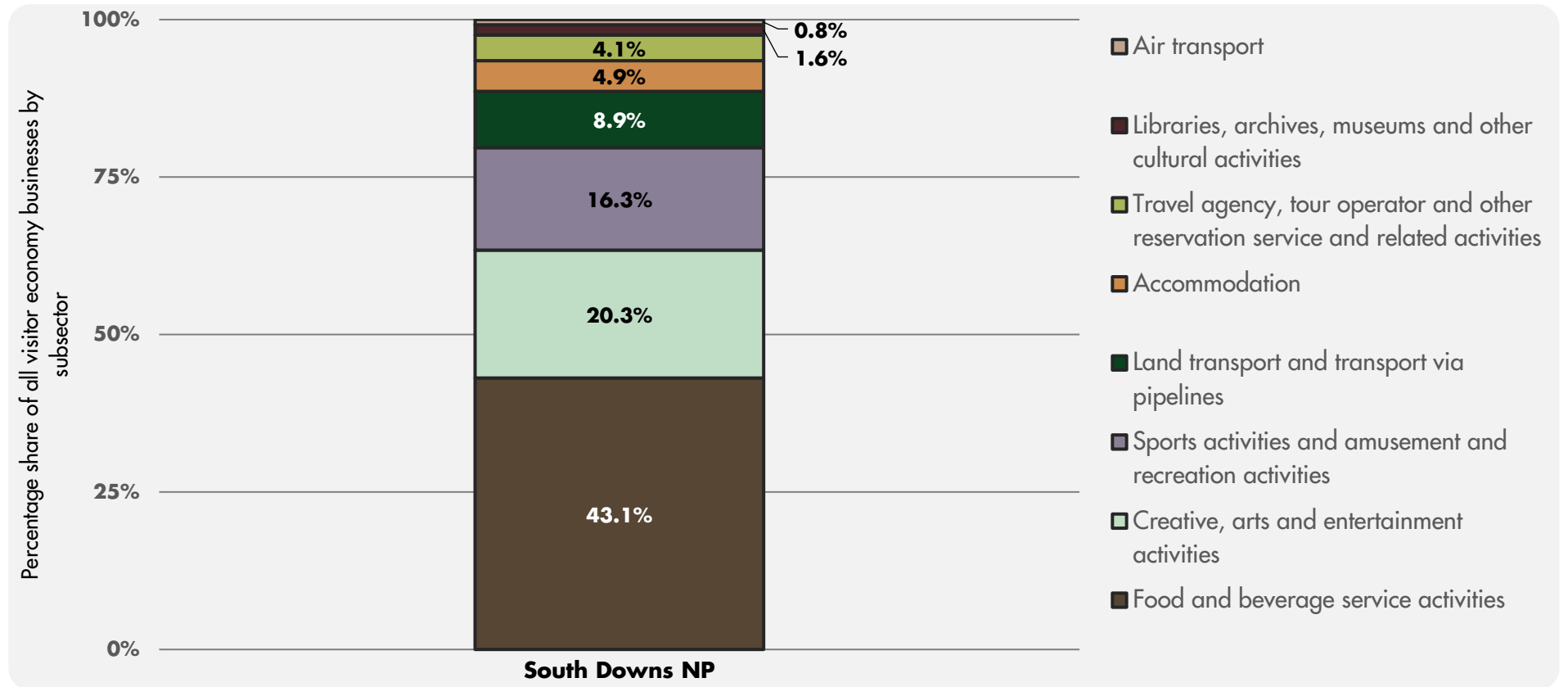
27

| Area  | 2016         | 2017        | 2018        | 2019        | 2020        | 2021        | 2022         | 2023         | 2024         |
|---|--------------|-------------|-------------|-------------|-------------|-------------|--------------|--------------|--------------|
| <b>East Sussex</b>                          | 10.7%        | 10.6%       | 10.8%       | 10.9%       | 11.8%       | 12.5%       | 11.3%        | 11.5%        | 11.4%        |
| <b>West Sussex</b>                          | 9.3%         | 9.1%        | 9.1%        | 9.1%        | 9.4%        | 10.0%       | 9.9%         | 10.1%        | 10.2%        |
| <b>Hampshire</b>                            | 8.3%         | 8.3%        | 8.2%        | 8.1%        | 8.3%        | 8.7%        | 8.9%         | 9.2%         | 9.1%         |
| <b>South East</b>                           | 9.6%         | 9.5%        | 9.5%        | 9.5%        | 9.7%        | 10.0%       | 10.2%        | 10.4%        | 10.4%        |
| <b>South Downs NP</b>                       | <b>10.0%</b> | <b>9.8%</b> | <b>9.7%</b> | <b>9.7%</b> | <b>9.8%</b> | <b>9.9%</b> | <b>10.4%</b> | <b>10.3%</b> | <b>10.4%</b> |
| <b>All English National Parks (Ex SDNP)</b> | 14.7%        | 14.9%       | 14.9%       | 15.2%       | 15.1%       | 14.9%       | 15.3%        | 15.3%        | 15.6%        |
| <b>Lake District NP</b>                     | 23.3%        | 23.3%       | 23.4%       | 23.3%       | 23.2%       | 22.5%       | 23.0%        | 22.9%        | 23.6%        |

27. Nomis: UK Business Counts - enterprises by industry and employment size band 2024. Filtered by 10 Visitor Economy 2 digit SICs

# THE VISITOR ECONOMY

Figure 10 – Sub-sectoral composition of the visitor economy in the South Downs National Park 2024 <sup>28</sup>



28. Nomis: UK Business Counts - enterprises by industry and employment size band 2024.

# THE VISITOR ECONOMY

Table 9 – Visitor Economy business count by subsector for South Downs National Park and comparator areas.<sup>29 30</sup>

Over time, the structure of the sector has remained consistent. Food and beverage businesses have declined slightly since 2016 but stabilised at 265 since 2022 (table 10). There has been a modest decline in creative and arts businesses (from 140 to 125), partially offset by a small rise in sports and recreation firms. However, these are marginal changes that do not indicate anything structural. The underlying pattern is one of a visitor economy that is dependable but not particularly dynamic.

| Visitor economy Subsector                                   | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|---|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| Food and beverage   | 1,310       | 1,765       | 2,395     | 19,075     | <b>265</b>     | 830                                  | 265              |
| Creative, arts and entertainment                            | 410         | 425         | 485       | 4,940      | <b>125</b>     | 100                                  | 20               |
| Sports activities and amusement and recreation              | 325         | 590         | 880       | 6,180      | <b>100</b>     | 210                                  | 65               |
| Transport   | 265         | 580         | 1070      | 8,115      | <b>60</b>      | 165                                  | 25               |
| Accommodation   | 225         | 230         | 310       | 2,235      | <b>30</b>      | 630                                  | 325              |
| Travel agency, tour operator and other reservation services | 60          | 135         | 155       | 1,280      | <b>25</b>      | 45                                   | 15               |
| Libraries, archives, museums and cultural                   | 20          | 25          | 40        | 280        | <b>10</b>      | 30                                   | 15               |

29. Nomis: UK Business Counts - enterprises by industry and employment size band 2024.

30. Transport is an aggregation of Air Transport, Water Transport and Land Transport & Pipelines subsectors

# THE VISITOR ECONOMY

Table 10 – Number of visitor economy businesses in the South Downs National Park by subsector 2016 - 2024.<sup>30</sup>  
<sup>31</sup>

| Visitor economy Subsector                                   | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|------|------|------|------|------|------|------|------|------|
| Food and beverage   | 270  | 260  | 255  | 250  | 240  | 245  | 260  | 265  | 265  |
| Creative, arts and entertainment                            | 140  | 140  | 140  | 145  | 135  | 135  | 140  | 135  | 125  |
| Sports activities and amusement and recreation              | 85   | 80   | 75   | 85   | 95   | 90   | 100  | 100  | 100  |
| Transport   | 65   | 70   | 70   | 60   | 60   | 60   | 70   | 55   | 60   |
| Accommodation   | 25   | 20   | 20   | 20   | 25   | 25   | 25   | 25   | 30   |
| Travel agency, tour operator and other reservation services | 30   | 25   | 20   | 25   | 25   | 25   | 25   | 25   | 25   |
| Libraries, archives, museums and cultural services          | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   |

30. Nomis: UK Business Counts - enterprises by industry and employment size band 2024.

31. Transport is an aggregation of Air Transport, Water Transport and Land Transport & Pipelines subsectors

# LAND-BASED ECONOMY



# LAND-BASED ECONOMY

## AGRICULTURE, FORESTRY AND FISHING

The South Downs National Park hosts a significant land-based economy, with agriculture and its related industries deeply embedded in its economic identity. According to the *UK Business Counts - enterprises by industry and employment size band* data set from ONS there were 400 registered Agriculture, Forestry & Fishing businesses in 2024: a decline from 440 in both 2020 and 2016.

However, this likely under-represents actual activity, as Defra's *Structure of the agricultural industry in England and the UK at June 2025* report recorded 906 agricultural holdings in 2024, the third-highest of any English National Park, after the Lake District and Yorkshire Dales (table 12).

The data suggests a diverse agricultural base (table 11). But one that has not shown any major shifts in the last 8 years. Mixed farming and cereal crops

remain the most common activities, each maintaining 65 - 80 active businesses throughout the period. Livestock enterprises such as sheep and equine rearing show a little decline, while newer or specialist activities such as aquaculture have appeared or expanded in small numbers.

However, the low sample sizes for some subclasses and flat trends across most areas suggest limited. The modest changes observed, such as a drop in equine and dairy businesses, are not large enough to indicate a structural shift.

# LAND-BASED ECONOMY

Table 11 – Breakdown of the agriculture, forestry and fishery sector by five digit sic code in the South Downs National Park 2016 – 2024 <sup>32</sup>

| Industry Subclass  | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|--|------|------|------|------|------|------|------|------|------|
| Growing of cereals (except rice), leguminous crops and oil seeds | 70   | 70   | 75   | 75   | 75   | 70   | 75   | 75   | 75   |
| Mixed farming  | 70   | 75   | 80   | 75   | 80   | 70   | 70   | 70   | 65   |
| Raising of horses and other equines                              | 70   | 65   | 65   | 65   | 60   | 50   | 50   | 50   | 55   |
| Raising of sheep and goats                                       | 55   | 55   | 55   | 55   | 60   | 50   | 50   | 50   | 50   |
| Growing of vegetables and melons, roots and tubers               | 35   | 35   | 35   | 35   | 40   | 40   | 40   | 35   | 35   |
| Silviculture and other forestry activities                       | 20   | 20   | 20   | 20   | 20   | 20   | 20   | 20   | 20   |
| Support activities for crop production                           | 10   | 10   | 10   | 15   | 15   | 15   | 20   | 20   | 15   |
| Support activities for animal production                         | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 15   | 10   |
| Raising of dairy cattle  | 15   | 15   | 10   | 10   | 10   | 10   | 10   | 10   | 10   |
| Raising of other cattle and buffaloes                            | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   |
| Support services to forestry                                     | 5    | 5    | 10   | 5    | 10   | 10   | 10   | 10   | 10   |
| Logging  | -    | -    | -    | -    | 5    | 5    | 10   | 5    | 10   |
| Growing of fibre crops   | 10   | 10   | 5    | 5    | 5    | 5    | 5    | 5    | 5    |
| Growing of other non-perennial crops                             | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    |
| Growing of pome fruits and stone fruits                          | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    |
| Plant propagation  | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    |
| Raising of other animals   | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    |
| Freshwater aquaculture   | -    | -    | -    | -    | 5    | 5    | 5    | 5    | 5    |
| Marine aquaculture   | -    | -    | -    | -    | -    | -    | -    | -    | 5    |
| Marine fishing   | 5    | 5    | 5    | 5    | 5    | 5    | 5    | 5    | -    |
| Raising of poultry   | 10   | 5    | 5    | 5    | 5    | -    | 5    | -    | -    |
| Raising of swinepigs   | 5    | 5    | 5    | -    | -    | -    | -    | -    | -    |

32. Nomis: UK Business Counts - enterprises by industry and employment size band 2024.

# LAND-BASED ECONOMY

Table 12 – comparison of number of farm holdings, area on farm holdings and average farm size for all English National Parks.<sup>33</sup>

A more detailed picture of the agricultural make up can be seen within Defra's *Structure of the agricultural industry in England and the UK at June* report.

South Downs farms tend to be of moderate size, averaging 127 hectares (table 12). This is the third highest of the 10 English National Parks.

| National Park                       | Number of Holdings | Total area on holdngs (ha) | Average farm size (ha) |
|-------------------------------------|--------------------|----------------------------|------------------------|
| Northumberland National Park        | 179                | 72,192                     | 403                    |
| Yorkshire Dales National Park       | 1,155              | 170,420                    | 148                    |
| <b>South Downs National Park</b>    | <b>906</b>         | <b>115,279</b>             | <b>127</b>             |
| Lake District National Park         | 1,211              | 148,431                    | 123                    |
| Exmoor National Park                | 532                | 53,627                     | 101                    |
| The Broads National Park            | 176                | 16,556                     | 94                     |
| North Yorkshire Moors National Park | 953                | 87,130                     | 91                     |
| Peak District National Park         | 1,368              | 107,487                    | 79                     |
| Dartmoor National Park              | 814                | 53,960                     | 66                     |
| New Forest National Park            | 316                | 12,994                     | 41                     |

33. Defra: Structure of the agricultural industry in England and the UK at June 2025

# LAND-BASED ECONOMY

Table 13 – share of English National Park farm holdings and area on farm holdings for each English National Parks.<sup>34</sup>

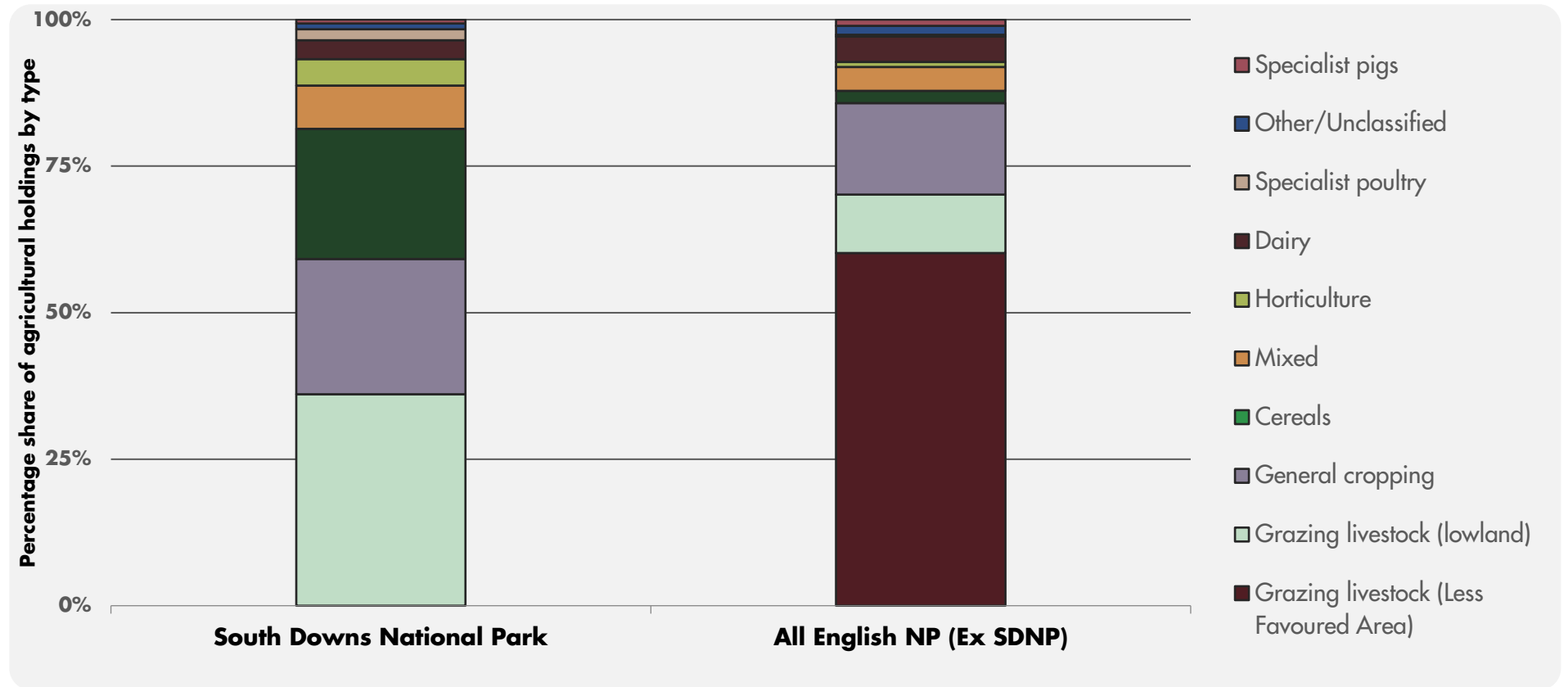
The South Downs is home to 13.8% of all English National Park agricultural land. The third highest share behind the Yorkshire Dales and Lake District. Agricultural holdings here show a different profile from other English National Parks, with a strong emphasis on arable farming—particularly general cropping and cereals—which account for nearly half of all holdings. In contrast, other National Parks are dominated by less favoured grazing, reflecting more marginal terrain (figure 11).

| National Park                       | Share of total number of holdings across English National Parks | Share of total area on holdings across all English National Parks |
|-------------------------------------|---|---|
| Peak District National Park         | 18.0%   | 12.8%   |
| Lake District National Park         | 15.9%   | 17.7%   |
| Yorkshire Dales National Park       | 15.2%   | 20.3%   |
| North Yorkshire Moors National Park | 12.5%   | 10.4%   |
| <b>South Downs National Park</b>    | <b>11.9%</b>  | <b>13.8%</b>  |
| Dartmoor National Park              | 10.7%   | 6.4%  |
| Exmoor National Park                | 7.0%  | 6.4%  |
| New Forest National Park            | 4.2%  | 1.6%  |
| Northumberland National Park        | 2.4%  | 8.6%  |
| The Broads National Park            | 2.3%  | 2.0%  |

34. Defra: Structure of the agricultural industry in England and the UK at June 2025

# LAND-BASED ECONOMY

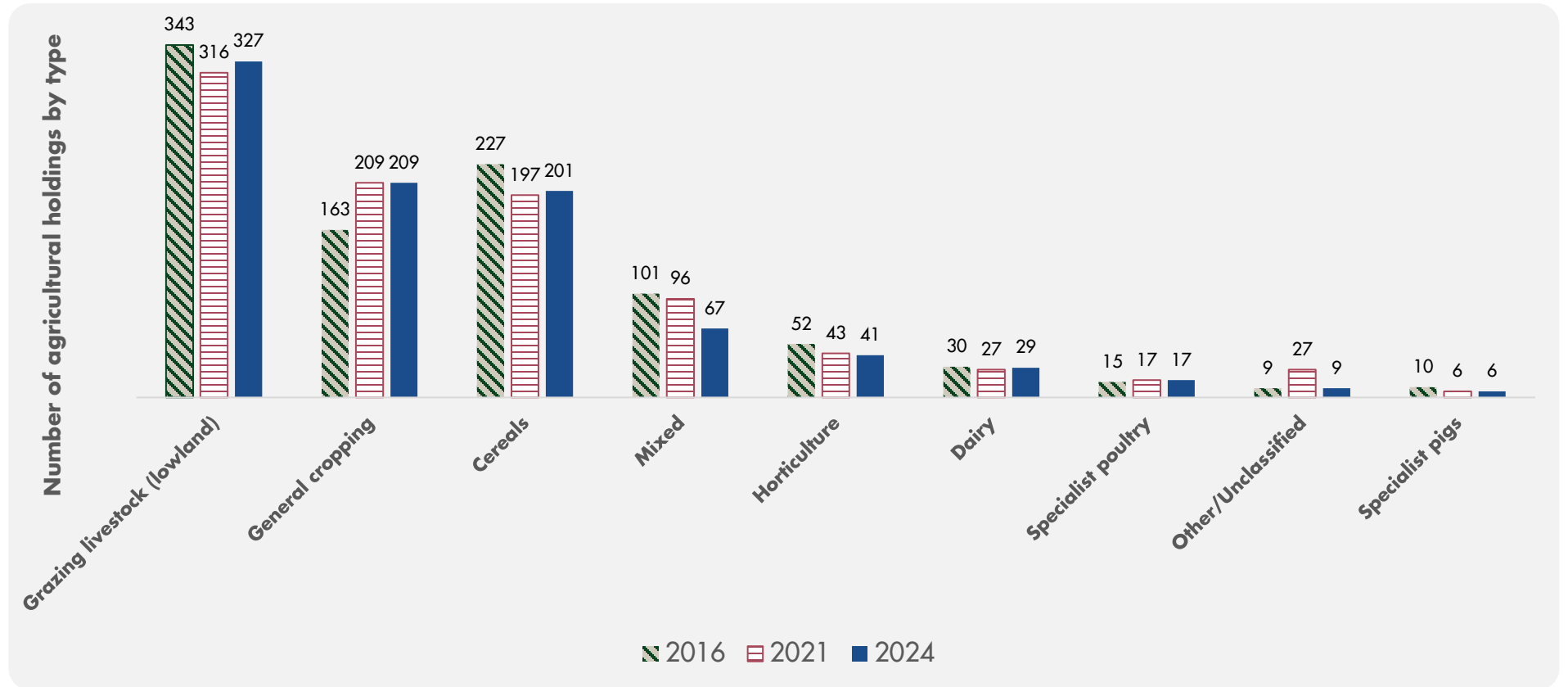
Figure 11 – Share of agricultural holdings by type in the South Downs National Park and in all English National Parks (Ex SDNP) 2024<sup>35</sup>



35. Defra: Structure of the agricultural industry in England and the UK at June 2025

# LAND-BASED ECONOMY

Figure 12 – Number of agricultural holdings by type in the South Downs National Park 2016, 2021, 2024. <sup>36</sup>



36. Defra: Structure of the agricultural industry in England and the UK at June 2025

# MANUFACTURING



# MANUFACTURING

The number and composition of manufacturing businesses in the South Downs National Park have remained broadly stable between 2020 and 2024. Total numbers show little variation, and most subsectors have seen minimal change. The number of businesses in architectural and engineering services has declined slightly, from 220 to 195; and civil engineering from 50 to 30, but all other subsectors have changed by 5 businesses or less: too small to be treated as statistically significant (table 14).

## MANUFACTURING TECHNOLOGY INTENSITY

The technology classification of manufacturing businesses in the South Downs National Park shows a sector that has stayed largely traditional over time (table 15). 62% of firms are classed as low-tech, with only 4% counted as high-tech in 2024, a small drop from 15 to 10 businesses since 2016. The number of firms in the medium- and medium-low-tech categories has stayed the same.

# MANUFACTURING

Table 14 – Number of manufacturing businesses by subsector in the South Downs National Park 2024 <sup>37</sup>

| Manufacturing Subsector  | 2016 | 2020 | 2024 |
|--|------|------|------|
| Architectural and engineering activities; technical testing and analysis | 220  | 200  | 195  |
| Other manufacturing  | 45   | 40   | 35   |
| Manufacture of fabricated metal products, except machinery and equipment | 30   | 30   | 30   |
| Civil engineering  | 50   | 50   | 30   |
| Manufacture of food products   | 20   | 20   | 25   |
| Manufacture of wood and of products of wood and cork, except furniture   | 25   | 20   | 25   |
| Printing and reproduction of recorded media                              | 30   | 20   | 25   |
| Manufacture of furniture   | 20   | 20   | 25   |
| Manufacture of rubber and plastic products                               | 10   | 15   | 15   |
| Manufacture of beverages   | 5    | 10   | 10   |
| Manufacture of other non-metallic mineral products                       | 10   | 10   | 10   |
| Manufacture of computer, electronic and optical products                 | 15   | 15   | 10   |
| Manufacture of machinery and equipment n.e.c.                            | 10   | 5    | 10   |
| Manufacture of textiles  | 5    | 10   | 5    |
| Manufacture of wearing apparel   | 5    | 5    | 5    |
| Manufacture of chemicals and chemical products                           | 10   | 10   | 5    |
| Manufacture of electrical equipment                                      | 5    | 5    | 5    |
| Manufacture of motor vehicles, trailers and semi-trailers                | -    | 5    | 5    |
| Manufacture of other transport equipment                                 | 5    | 10   | 5    |
| Manufacture of basic metals  | 5    | 5    | -    |

37. Nomis: UK Business Counts - enterprises by industry and employment size band 2024.

# MANUFACTURING

Table 15 – Classification of manufacturing businesses by technology intensity in the South Downs National Park 2016, 2020 & 2024 <sup>38</sup>

| Technology Intensity                           | Manufacturing Subsector  | 2016       | 2020       | 2024       |
|--|--|------------|------------|------------|
| High tech manufacturing                        | Manufacture of computer, electronic and optical products                 | 15         | 15         | 10         |
| <b>Total high tech manufacturing</b>           |  | <b>15</b>  | <b>15</b>  | <b>10</b>  |
| Medium to high tech manufacturing              | Manufacture of chemicals and chemical products                           | 10         | 10         | 5          |
|  | Manufacture of electrical equipment                                      | 5          | 5          | 5          |
|  | Manufacture of machinery and equipment                                   | 10         | 5          | 10         |
|  | Manufacture of motor vehicles, trailers and semi-trailers                | -          | 5          | 5          |
|  | Manufacture of other transport equipment                                 | 5          | 10         | 5          |
| <b>Total medium to high tech manufacturing</b> |  | <b>30</b>  | <b>35</b>  | <b>30</b>  |
| Medium to low tech manufacturing               | Manufacture of rubber and plastic products                               | 10         | 15         | 15         |
|  | Manufacture of other non-metallic mineral products                       | 10         | 10         | 10         |
|  | Manufacture of basic metals  | 5          | 5          | -          |
|  | Manufacture of fabricated metal products, except machinery and equipment | 30         | 30         | 30         |
| <b>Total medium to low tech manufacturing</b>  |  | <b>55</b>  | <b>60</b>  | <b>55</b>  |
| Low tech manufacturing                         | Manufacture of food products   | 20         | 20         | 25         |
|  | Manufacture of beverages   | 5          | 10         | 10         |
|  | Manufacture of textiles  | 5          | 10         | 5          |
|  | Manufacture of wearing apparel   | 5          | 5          | 5          |
|  | Manufacture of wood and of products of wood and cork, except furniture   | 25         | 20         | 25         |
|  | Printing and reproduction of recorded media                              | 30         | 20         | 25         |
|  | Manufacture of furniture   | 20         | 20         | 25         |
|  | Other manufacturing  | 45         | 40         | 35         |
| <b>Total low tech manufacturing</b>            |  | <b>155</b> | <b>145</b> | <b>155</b> |

38. Nomis: UK Business Counts - enterprises by industry and employment size band 2024.

# EMPLOYMENT



# EMPLOYMENT

## EMPLOYMENT CHANGE AND SECTOR BREAKDOWN

Compared to the wider South East and other National Parks, the South Downs appears to have weathered COVID-19 disruptions to employment with less turbulence and a quicker return to growth (table 16).

The South Downs presents a distinctive employment profile. It is more balanced and diversified than other National Parks, and more reflective of the wider South East economy in which it sits (table 17). In contrast, the Lake District relies heavily on seasonal tourism, with more than three times the share of jobs in accommodation and food services (37%) compared to the South Downs (12%). Tourism in the SDNP is one of several economic pillars, but not the whole story.

# EMPLOYMENT

Table 16 – Total employees in South Downs National Park and comparator areas 2016 – 2023 <sup>39</sup>

| Year        | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|-------------|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| <b>2016</b> | 181,000     | 381,000     | 601,000   | 4,147,000  | <b>54,000</b>  | 86,000                               | 25,000           |
| <b>2017</b> | 181,000     | 382,000     | 600,000   | 4,107,000  | <b>55,000</b>  | 82,000                               | 22,000           |
| <b>2018</b> | 182,000     | 386,000     | 607,000   | 4,147,000  | <b>56,000</b>  | 83,000                               | 23,000           |
| <b>2019</b> | 184,000     | 392,000     | 615,000   | 4,214,000  | <b>59,000</b>  | 83,000                               | 24,000           |
| <b>2020</b> | 179,000     | 380,000     | 593,000   | 4,107,000  | <b>55,000</b>  | 80,000                               | 22,000           |
| <b>2021</b> | 187,000     | 376,000     | 591,000   | 4,153,000  | <b>56,000</b>  | 83,000                               | 23,000           |
| <b>2022</b> | 181,000     | 379,000     | 621,000   | 4,269,000  | <b>59,000</b>  | 84,000                               | 22,000           |
| <b>2023</b> | 191,000     | 394,000     | 624,000   | 4,325,000  | <b>61,000</b>  | 87,000                               | 25,000           |

39: Nomis: Annual population survey 2025

# EMPLOYMENT

Table 17 – Total and percentage share of all employment by sector for South Downs National Park and Comparator Areas in 2024 <sup>40</sup>

| Sector   | East Sussex |       | Hampshire |       | West Sussex |       | South East |       | South Downs NP |              | All English National Parks (Ex SDNP) |       | Lake District NP |       |
|--|-------------|-------|-----------|-------|-------------|-------|------------|-------|----------------|--------------|--------------------------------------|-------|------------------|-------|
|  | No.         | %     | No.       | %     | No.         | %     | No.        | %     | No.            | %            | No.                                  | %     | No.              | %     |
| Accommodation & food services                    | 25,000      | 13.1% | 52,000    | 8.3%  | 38,000      | 9.7%  | 371,000    | 8.6%  | <b>7,000</b>   | <b>11.6%</b> | 25,000                               | 28.8% | 9,000            | 36.9% |
| Manufacturing                                    | 12,000      | 6.3%  | 48,000    | 7.7%  | 29,000      | 7.4%  | 261,000    | 6.0%  | <b>6,000</b>   | <b>10.0%</b> | 5,000                                | 5.8%  | 800              | 3.3%  |
| Education  | 17,000      | 8.9%  | 49,000    | 7.8%  | 31,000      | 7.9%  | 422,000    | 9.8%  | <b>6,000</b>   | <b>10.0%</b> | 7,000                                | 8.1%  | 1,500            | 6.2%  |
| Health   | 37,000      | 19.4% | 72,000    | 11.5% | 54,000      | 13.7% | 603,000    | 13.9% | <b>6,000</b>   | <b>10.0%</b> | 7,000                                | 8.1%  | 1,250            | 5.1%  |
| Retail   | 19,000      | 10.0% | 60,000    | 9.6%  | 37,000      | 9.4%  | 372,000    | 8.6%  | <b>5,000</b>   | <b>8.3%</b>  | 7,000                                | 8.1%  | 3,000            | 12.3% |
| Professional, scientific & technical             | 11,000      | 5.8%  | 57,000    | 9.1%  | 27,000      | 6.9%  | 387,000    | 8.9%  | <b>5,000</b>   | <b>8.3%</b>  | 6,000                                | 6.9%  | 1,750            | 7.2%  |
| Arts, entertainment, recreation & other services | 11,000      | 5.8%  | 34,000    | 5.4%  | 22,000      | 5.6%  | 225,000    | 5.2%  | <b>5,000</b>   | <b>8.3%</b>  | 7,000                                | 8.1%  | 2,000            | 8.2%  |
| Public administration & defence                  | 9,000       | 4.7%  | 27,000    | 4.3%  | 12,000      | 3.1%  | 151,000    | 3.5%  | <b>4,500</b>   | <b>7.5%</b>  | 1,500                                | 1.7%  | 225              | 0.9%  |

40: Nomis: Annual population survey 2025

# EMPLOYMENT

Table 17 (cont.) – Total and percentage share of all employment by sector for South Downs National Park and Comparator Areas

| Sector                                     | East Sussex |      | Hampshire |      | West Sussex |      | South East |      | South Downs NP |             | All English National Parks (Ex SDNP) |      | Lake District NP |      |
|--|-------------|------|-----------|------|-------------|------|------------|------|----------------|-------------|--------------------------------------|------|------------------|------|
|  | No.         | %    | No.       | %    | No.         | %    | No.        | %    | No.            | %           | No.                                  | %    | No.              | %    |
| Business administration & support services | 8,000       | 4.2% | 47,000    | 7.5% | 36,000      | 9.2% | 345,000    | 8.0% | <b>4,000</b>   | <b>6.7%</b> | 4,000                                | 4.6% | 1,000            | 4.1% |
| Construction                               | 11,000      | 5.8% | 34,000    | 5.4% | 16,000      | 4.1% | 209,000    | 4.8% | <b>3,000</b>   | <b>5.0%</b> | 4,500                                | 5.2% | 900              | 3.7% |
| Wholesale                                  | 7,000       | 3.7% | 29,000    | 4.6% | 15,000      | 3.8% | 191,000    | 4.4% | <b>2,000</b>   | <b>3.3%</b> | 2,500                                | 2.9% | 500              | 2.1% |
| Information & communication                | 4,000       | 2.1% | 34,000    | 5.4% | 12,000      | 3.1% | 239,000    | 5.5% | <b>1,750</b>   | <b>2.9%</b> | 1,750                                | 2.0% | 300              | 1.2% |
| Property                                   | 3,500       | 1.8% | 11,000    | 1.8% | 7,000       | 1.8% | 73,000     | 1.7% | <b>1,500</b>   | <b>2.5%</b> | 1,750                                | 2.0% | 450              | 1.8% |
| Motor trades                               | 4,000       | 2.1% | 14,000    | 2.2% | 8,000       | 2.0% | 84,000     | 1.9% | <b>1,000</b>   | <b>1.7%</b> | 1,250                                | 1.4% | 350              | 1.4% |
| Transport & storage                        | 4,500       | 2.4% | 27,000    | 4.3% | 29,000      | 7.4% | 199,000    | 4.6% | <b>800</b>     | <b>1.3%</b> | 2,000                                | 2.3% | 450              | 1.8% |
| Financial & insurance                      | 4,000       | 2.1% | 18,000    | 2.9% | 11,000      | 2.8% | 114,000    | 2.6% | <b>800</b>     | <b>1.3%</b> | 500                                  | 0.6% | 50               | 0.2% |
| Mining, quarrying & utilities              | 1,750       | 0.9% | 7,000     | 1.1% | 4,500       | 1.1% | 50,000     | 1.2% | <b>400</b>     | <b>0.7%</b> | 2,000                                | 2.3% | 500              | 2.1% |
| Agriculture, forestry & fishing            | 2,000       | 1.0% | 4,500     | 0.7% | 4,500       | 1.1% | 29,000     | 0.7% | <b>350</b>     | <b>0.6%</b> | 1,000                                | 1.2% | 350              | 1.4% |

# EMPLOYMENT

## KNOWLEDGE ECONOMY EMPLOYMENT

Table 18 – Knowledge economy jobs as a percentage of total jobs in the South Downs National Park and the comparator areas 2016, 2019 and 2023 <sup>41</sup>

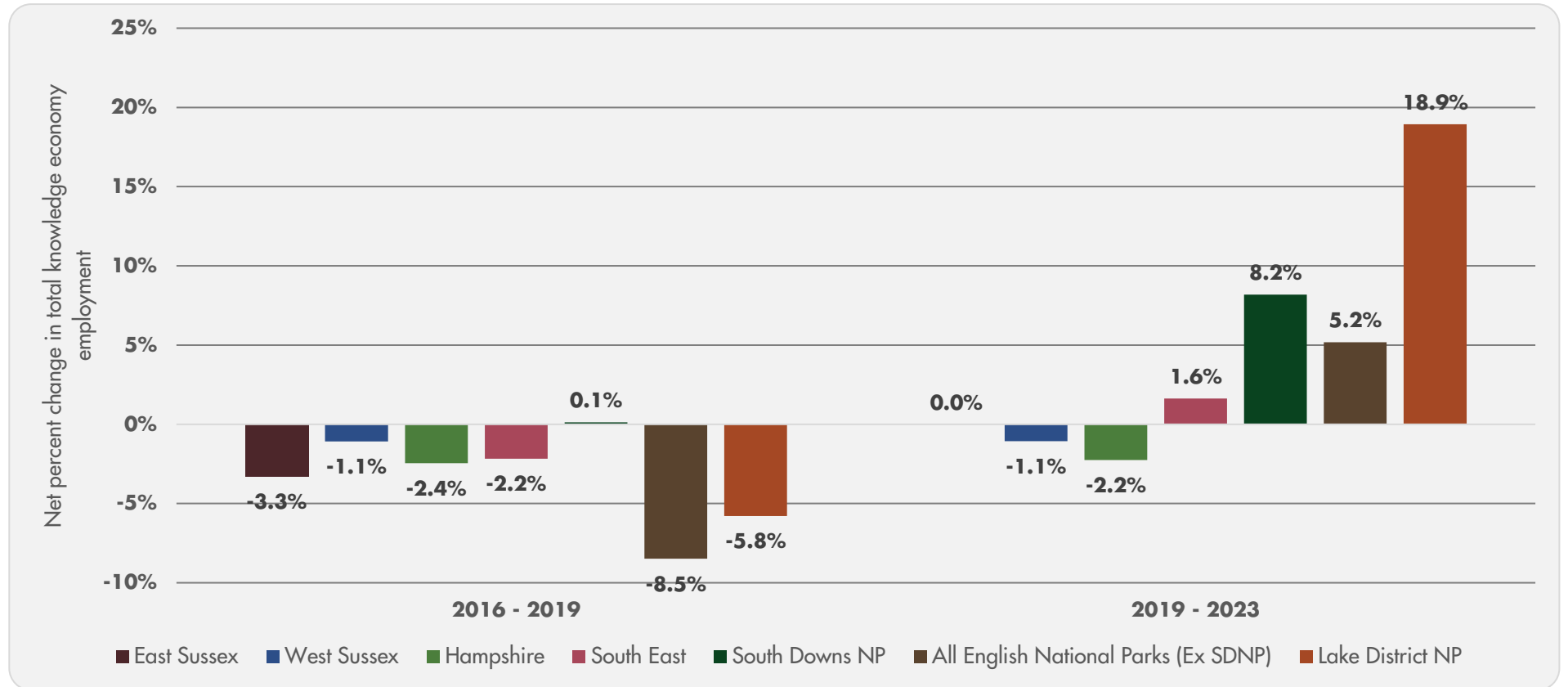
The South Downs National Park hosts a relatively strong knowledge economy for a predominantly rural area. Higher than other national parks (table 18). The share over time has declined 0.9% from 2016 to 2024, in line with declines seen in all other comparator areas. In absolute terms, the SDNP has seen more resilience and growth in job numbers than all other areas except the Lake District (figure 13).

| Year        | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|-------------|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| <b>2016</b> | 22.3%       | 23.0%       | 28.3%     | 28.8%      | 22.8%          | 17.5%                                | 12.8%            |
| <b>2019</b> | 21.2%       | 22.1%       | 26.9%     | 27.7%      | 20.9%          | 16.6%                                | 12.5%            |
| <b>2023</b> | 20.4%       | 21.8%       | 26.0%     | 27.4%      | 21.9%          | 16.7%                                | 14.3%            |

41. Nomis: Annual population survey 2025

# EMPLOYMENT

Figure 13 – Increase / decrease in the number of Knowledge Economy jobs 2016 - 2019 and 2019 - 2023 in The South Downs National Park and comparator areas <sup>42</sup>



42. Nomis: Annual population survey 2025

# EMPLOYMENT

Subsector data illustrates that the bulk of knowledge economy employment in the South Downs National Park sits in traditional and public-facing services (table 19). Education remains the largest single employer followed by consultancy and management activities and IT services. This composition suggests a service-oriented knowledge economy shaped by SDNP's population and local demand rather than a concentration of innovation-led industries. The dominance of education roles in a geography without a university, combined with the high proportion of micro-enterprises in IT, makes it unlikely that SDNP is home to significant research, development or high-investment technology activity. These patterns point to a professionalised but low capital-investment knowledge economy. The distribution of employment within the Knowledge Intensive Services (KIS) subsectors reinforces the South Downs' orientation towards professional services (figure 14).

Over 45% of KIS employment in the South Downs sits in Knowledge Intensive Market Services (KIMS), such as consulting and design services. This is broadly in line with the average across all National Parks, though the South Downs has a notably higher absolute volume of such jobs. High-Tech KIS and financial services, by contrast, make up a small proportion, similar to other National Parks. This implies that while the South Downs is a viable base for small consultancies and professional service firms there is little evidence of clustering or growth in cutting-edge digital or creative industries. It is worth noting that these figures are based on relatively small employment totals, and some sub-sector data may be affected by low sample sizes.

# EMPLOYMENT

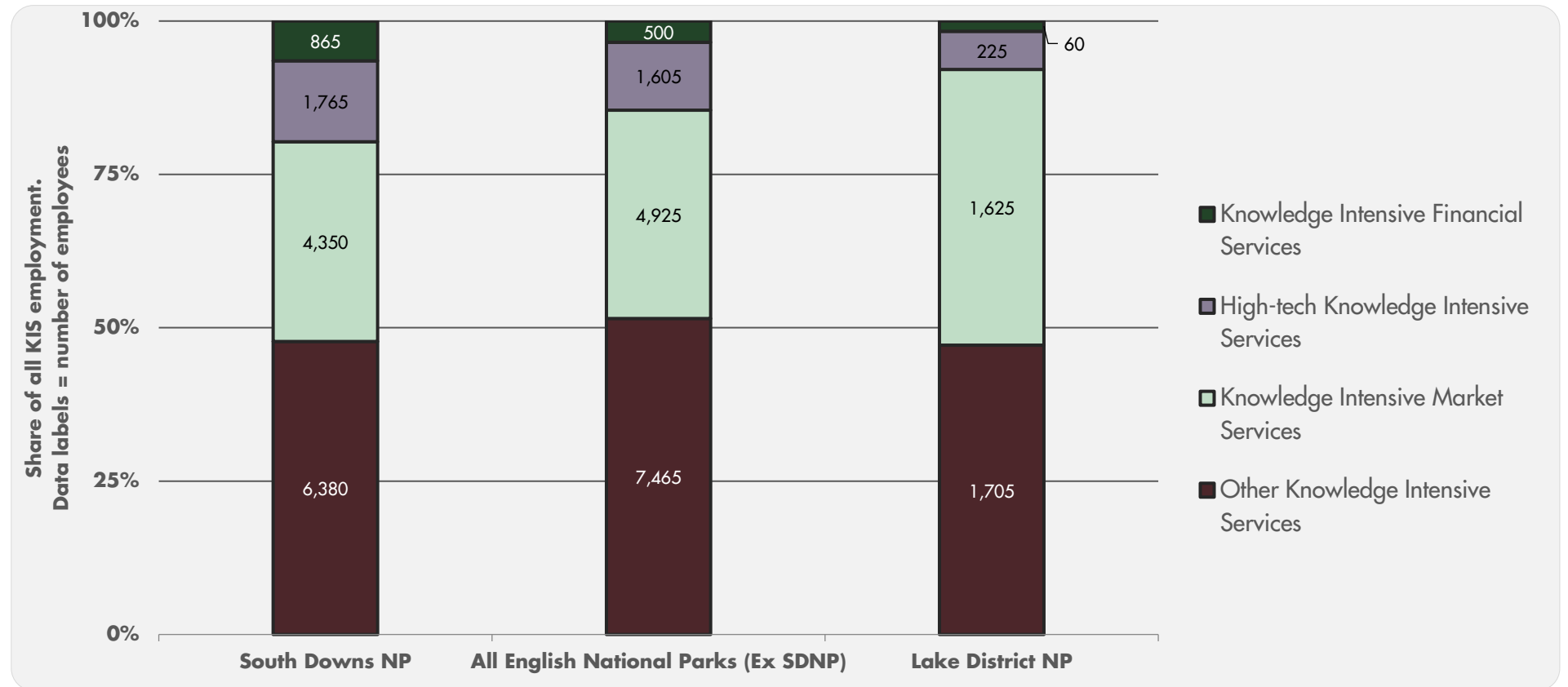
Table 19 – Number of knowledge economy employees by subsector <sup>43</sup>

| Subsector  | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|--|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| Education  | 17,000      | 31,000      | 49,000    | 422,000    | <b>6,000</b>   | 7,000                                | 1,500            |
| Activities of head offices; management consultancy activities  | 4,000       | 9,000       | 18,000    | 138,000    | <b>1,750</b>   | 1,750                                | 400              |
| Computer programming, consultancy and related activities   | 2,000       | 7,000       | 24,000    | 158,000    | <b>1,000</b>   | 900                                  | 75               |
| Legal and accounting activities  | 3,000       | 6,000       | 11,000    | 74,000     | <b>900</b>     | 1,500                                | 1,000            |
| Architectural and engineering activities   | 2,000       | 4,500       | 14,000    | 71,000     | <b>900</b>     | 1,000                                | 100              |
| Activities auxiliary to financial services and insurance activities  | 3,500       | 7,000       | 8,000     | 56,000     | <b>600</b>     | 350                                  | 30               |
| Other professional, scientific and technical activities  | 900         | 1,500       | 3,000     | 21,000     | <b>450</b>     | 500                                  | 75               |
| Advertising and market research  | 500         | 1,250       | 2,000     | 28,000     | <b>350</b>     | 200                                  | 15               |
| Motion picture, video and television programme production, sound recording and music publishing activities | 700         | 1,250       | 1,250     | 14,000     | <b>300</b>     | 200                                  | 45               |
| Manufacture of computer, electronic and optical products   | 2,250       | 6,000       | 7,000     | 34,000     | <b>250</b>     | 250                                  | 75               |
| Financial service activities, except insurance and pension funding   | 800         | 3,500       | 7,000     | 44,000     | <b>225</b>     | 150                                  | 30               |
| Scientific research and development  | 250         | 2,000       | 6,000     | 40,000     | <b>200</b>     | 175                                  | 50               |
| Publishing activities  | 500         | 1,500       | 1,000     | 18,000     | <b>150</b>     | 250                                  | 150              |
| Telecommunications   | 600         | 1,750       | 5,000     | 35,000     | <b>150</b>     | 175                                  | 20               |
| Information service activities   | 225         | 1,000       | 1,250     | 11,000     | <b>50</b>      | 75                                   | 10               |
| Insurance, reinsurance and pension funding   | 100         | 1,000       | 2,500     | 14,000     | <b>40</b>      | -                                    | -                |
| Printing and reproduction of recorded media  | 600         | 500         | 1,250     | 6,000      | <b>30</b>      | 40                                   | 5                |
| Programming and broadcasting activities  | 25          | 75          | 700       | 2,500      | <b>15</b>      | 5                                    | -                |

<sup>43</sup>: Nomis: Annual population survey 2025

# EMPLOYMENT

Figure 14 – share of Knowledge Intensive Service employment between the four Knowledge Intensive Service subsectors in the South Downs National Park and comparator national parks. <sup>44</sup>



44: Nomis: Annual population survey 2025.

# EMPLOYMENT

## VISITOR ECONOMY EMPLOYMENT

Visitor economy (VE) employment in the South Downs National Park has remained consistent over the period 2019 to 2023, representing 16 to 19 percent of total jobs. This contrasts with other National Parks and in particular the Lake District, where VE accounted for 43 percent of employment in 2023 and where there has been a fall of 7% since 2019 (table 20).

Within the sector, food and beverage services are the dominant source of employment, providing around 6,000 jobs in the South Downs National Park in 2023, followed by sports and recreation (2,250 jobs) and cultural activities (1,500 jobs) (table 21).

Across the period, most subsectors have shown little movement. Employment in food and beverage services remained stable, while minor growth in cultural and

recreational roles suggests some diversification, but more in line with expectations due to the area's plentiful opportunity for outdoor and natural activity (table 22). Accommodation employment has returned to pre-COVID levels, with hotels employing 1,250 people in 2023, its 2018 level, after dipping to 800 in 2021.

Public houses and licensed restaurants continue to make up the bulk of hospitality jobs, with 2,500 and 1,500 employees respectively (table 23). While overall numbers remain modest, one notable trend is a tripling of employment in campsites between 2020 and 2023, now accounting for 75 jobs (table 24). Although small in absolute terms, this growth points to a rapidly growing sector alongside the accommodation stock data that shows businesses are doubling as well.

# EMPLOYMENT

Table 20 – Visitor economy employment as a percentage of overall employment for the South Downs National Park and comparator areas 2016 – 2023 <sup>45</sup>

| Year        | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|-------------|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| <b>2016</b> | 14%         | 10%         | 18%       | 12%        | <b>19%</b>     | 36%                                  | 50%              |
| <b>2017</b> | 15%         | 9%          | 19%       | 12%        | <b>20%</b>     | 36%                                  | 47%              |
| <b>2018</b> | 14%         | 10%         | 18%       | 12%        | <b>18%</b>     | 38%                                  | 52%              |
| <b>2019</b> | 14%         | 10%         | 18%       | 12%        | <b>18%</b>     | 37%                                  | 50%              |
| <b>2020</b> | 14%         | 10%         | 17%       | 12%        | <b>18%</b>     | 33%                                  | 45%              |
| <b>2021</b> | 13%         | 9%          | 18%       | 12%        | <b>16%</b>     | 37%                                  | 51%              |
| <b>2022</b> | 15%         | 9%          | 20%       | 12%        | <b>19%</b>     | 36%                                  | 49%              |
| <b>2023</b> | 18%         | 11%         | 20%       | 14%        | <b>19%</b>     | 38%                                  | 43%              |

45: Nomis: Annual population survey 2025

# EMPLOYMENT

Table 21 – Visitor Economy Employment by subsector for South Downs National Park and Comparator Areas 2023  
46 47

| VE Subsector  | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|---|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| Food and beverage services                                  | 20,000      | 28,000      | 41,000    | 304,000    | <b>6,000</b>   | 13,000                               | 3,000            |
| Sports activities and amusement and recreation              | 4,000       | 10,000      | 13,000    | 98,000     | <b>2,250</b>   | 2,500                                | 500              |
| Libraries, archives, museums and other cultural activities  | 1,000       | 2,250       | 3,000     | 17,000     | <b>1,500</b>   | 2,250                                | 600              |
| Accommodation   | 5,000       | 10,000      | 12,000    | 67,000     | <b>1,250</b>   | 13,000                               | 6,000            |
| Transport   | 2,520       | 13,050      | 8,800     | 73,000     | <b>260</b>     | 1,600                                | 400              |
| Travel agency, tour operator and other reservation services | 350         | 2,000       | 1,250     | 11,000     | <b>225</b>     | 300                                  | 175              |
| Creative, arts and entertainment activities                 | 800         | 900         | 900       | 10,000     | <b>200</b>     | 250                                  | 75               |

46. Nomis: Annual population survey 2025

47: Transport is an aggregation of Air Transport, Water Transport and Land Transport & Pipelines subsectors

# EMPLOYMENT

Table 22 – Visitor Economy Employment by subsector for South Downs National Park 2016 - 2023. <sup>48 49</sup>

| Visitor Economy Subsector                                   | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2022  | 2023  |
|---|-------|-------|-------|-------|-------|-------|-------|-------|
| Food and beverage   | 5,000 | 6,000 | 5,000 | 6,000 | 6,000 | 5,000 | 6,000 | 6,000 |
| Sports activities and amusement and recreation              | 1,750 | 1,500 | 1,500 | 1,250 | 1,500 | 1,250 | 2,000 | 2,250 |
| Libraries, archives, museums and cultural                   | 1,250 | 1,500 | 1,250 | 1,000 | 900   | 1,250 | 1,000 | 1,500 |
| Accommodation   | 1,000 | 1,500 | 1,250 | 1,500 | 800   | 900   | 1,000 | 1,250 |
| Transport   | 515   | 305   | 405   | 305   | 240   | 265   | 295   | 260   |
| Travel agency, tour operator and other reservation services | 400   | 200   | 250   | 500   | 225   | 300   | 300   | 225   |
| Creative, arts and entertainment                            | 175   | 225   | 300   | 125   | 225   | 225   | 350   | 200   |

48. Nomis: Annual population survey 2025

49: Transport is an aggregation of Air Transport, Water Transport and Land Transport & Pipelines subsectors

# EMPLOYMENT

Table 23 – Number of jobs in the food and drink subsector in the South Downs National Park 2016, 2020, 2023 <sup>50</sup>

| Food and drink subsector                    | 2016  | 2020  | 2023  |
|---|-------|-------|-------|
| Public houses and bars                      | 2,250 | 2,500 | 2,500 |
| Licensed restaurants                        | 1,000 | 1,000 | 1,500 |
| Unlicensed restaurants and cafes            | 900   | 1,000 | 1,000 |
| Event catering activities                   | 500   | 300   | 500   |
| Other food service activities               | 450   | 400   | 200   |
| Take away food shops and mobile food stands | 100   | 100   | 150   |
| Licensed clubs                              | 50    | 50    | 50    |

50. Nomis: Annual population survey 2025

# EMPLOYMENT

## ACCOMODATION

Table 24 – number of jobs in the accommodation subsector in the South Downs National Park 2016 to 2023 <sup>51</sup>

| Accommodation Sub-sector                                      | 2016  | 2017  | 2018  | 2019  | 2020 | 2021 | 2022 | 2023  |
|---|-------|-------|-------|-------|------|------|------|-------|
| Hotels and similar accommodation                              | 1,000 | 1,250 | 1,250 | 1,250 | 800  | 800  | 900  | 1,250 |
| Camping grounds, recreational vehicle parks and trailer parks | 25    | 25    | 45    | 50    | 25   | 30   | 50   | 75    |
| Other holiday or short stay accomodation                      | 10    | 15    | 15    | 15    | 10   | 10   | 20   | 30    |
| Holiday centres and villages                                  | -     | 10    | 10    | 10    | 20   | 20   | -    | 10    |
| Youth hostels   | -     | -     | -     | -     | -    | -    | -    | -     |
| Other accommodation   | 5     | 10    | 10    | -     | -    | -    | 10   | -     |

51. Nomis: Business Register and Employment Survey : open access 2023

# EMPLOYMENT

## MANUFACTURING EMPLOYMENT

Employment in manufacturing within the South Downs National Park has grown sharply since 2016, increasing from 3,675 to 6,265 in 2024, with most of that growth occurring after 2020. The increase is largely driven by a small number of high-impact employers rather than by widespread expansion across the sector. Whitman Laboratories, operating in the chemicals sector, and Rolls-Royce, whose headquarters is just outside the South Downs boundary, together account for a significant share of the manufacturing workforce.

Around 1,500 motor vehicle manufacturing jobs are attributed to residents within the Lavant LSOA area, capturing a portion of the Rolls-Royce labour force within this data. While such firms provide valuable employment, the pattern suggests that growth is being driven more by a handful of anchor employers than by broad-based

expansion (table 25). Compared with other areas, the SDNP's manufacturing mix has a distinctive shape. There is a strong presence of traditional and craft-based subsectors, including food and drink, wood and furniture, and metalwork. Food and drink represents 10 percent of manufacturing in the South Downs: nearly twice the proportion seen in the South East. This reflects the locally embedded forms of production that draw on regional resources.

However, while this adds economic identity, it suggests a concentration in lower-wage, slower-growth industries that may not easily attract investment. Technology classification data underlines this challenge (table 27). Just 4 percent of manufacturing jobs in the SDNP are in high-tech sectors.

# EMPLOYMENT

Table 25 – Total employment in the manufacturing sub-sectors in the South Downs National Park 2016 – 2023 <sup>52</sup>

| Manufacturing subsector  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2022  | 2023  |
|--|-------|-------|-------|-------|-------|-------|-------|-------|
| Manufacture of motor vehicles  | 1,000 | 1,500 | 1,500 | 1,500 | 2,000 | 1,500 | 1,500 | 2,000 |
| Manufacture of chemicals and chemical products                         | 600   | 600   | 600   | 800   | 600   | 800   | 1,000 | 1,000 |
| Manufacture of food products   | 200   | 350   | 400   | 600   | 350   | 400   | 700   | 600   |
| Other manufacturing  | 250   | 350   | 125   | 225   | 300   | 300   | 200   | 500   |
| Manufacture of machinery and equipment                                 | 175   | 125   | 250   | 350   | 300   | 300   | 400   | 350   |
| Manufacture of fabricated metal products                               | 300   | 300   | 300   | 225   | 400   | 300   | 350   | 300   |
| Manufacture of beverages   | 125   | 150   | 175   | 250   | 200   | 250   | 300   | 250   |
| Manufacture of computer, electronic and optical products               | 250   | 250   | 200   | 300   | 250   | 200   | 200   | 250   |
| Manufacture of rubber and plastic products                             | 75    | 75    | 100   | 100   | 75    | 200   | 175   | 225   |
| Manufacture of electrical equipment                                    | 225   | 225   | 175   | 225   | 225   | 150   | 150   | 200   |
| Manufacture of furniture   | 125   | 50    | 75    | 150   | 175   | 200   | 125   | 200   |
| Manufacture of wood and of products of wood and cork, except furniture | 250   | 175   | 75    | 300   | 150   | 100   | 225   | 125   |
| Manufacture of other non-metallic mineral products                     | 50    | 75    | 150   | 150   | 200   | 150   | 50    | 125   |
| Manufacture of wearing apparel   | 10    | 10    | 5     | 40    | 20    | 40    | 10    | 40    |
| Manufacture of other transport equipment                               | 5     | -     | 5     | 15    | 10    | 45    | 75    | 35    |
| Printing and reproduction of recorded media                            | 75    | 75    | 75    | 50    | 75    | 50    | 50    | 30    |
| Manufacture of textiles  | 30    | 35    | 35    | 75    | 20    | 30    | 15    | 15    |
| Manufacture of paper and paper products                                | -     | -     | -     | 5     | -     | 5     | 5     | 10    |
| Manufacture of basic pharmaceutical products                           | 20    | 30    | 10    | 10    | 10    | 10    | 10    | 10    |
| Manufacture of leather and related products                            | -     | -     | -     | -     | -     | -     | 10    | -     |

52. Nomis: Business Register and Employment Survey : open access 2023

# EMPLOYMENT

Table 26 – Total employment in the manufacturing sub-sectors in the South Downs National Park and comparator areas 2023 <sup>53</sup>

| Manufacturing subsector                                  | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|--|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| Manufacture of motor vehicles                            | 100         | 2,500       | 1,500     | 14,000     | 2,000          | 250                                  | 5                |
| Manufacture of chemicals and chemical products           | 350         | 500         | 2,500     | 10,000     | 1,000          | 50                                   | 20               |
| Manufacture of food products                             | 700         | 3,000       | 2,500     | 24,000     | 600            | 900                                  | 175              |
| Other manufacturing                                      | 450         | 2,000       | 4,000     | 16,000     | 500            | 350                                  | 150              |
| Manufacture of machinery and equipment                   | 1,250       | 1,500       | 4,500     | 20,000     | 350            | 400                                  | 20               |
| Manufacture of fabricated metal products                 | 1,250       | 2,500       | 6,000     | 34,000     | 300            | 600                                  | 25               |
| Manufacture of beverages                                 | 300         | 350         | 500       | 3,500      | 250            | 500                                  | 100              |
| Manufacture of computer, electronic and optical products | 2,250       | 6,000       | 7,000     | 34,000     | 250            | 250                                  | 75               |
| Manufacture of rubber and plastic products               | 700         | 1,500       | 2,500     | 15,000     | 225            | 75                                   | -                |
| Manufacture of electrical equipment                      | 600         | 1,500       | 3,000     | 12,000     | 200            | 150                                  | -                |
| Manufacture of furniture                                 | 600         | 900         | 1,000     | 7,000      | 200            | 150                                  | 35               |
| Manufacture of wood and of products of wood and cork     | 500         | 500         | 700       | 5,000      | 125            | 225                                  | 45               |
| Manufacture of other non-metallic mineral products       | 700         | 900         | 900       | 8,000      | 125            | 700                                  | 10               |
| Manufacture of wearing apparel                           | 150         | 300         | 400       | 3,500      | 40             | 20                                   | -                |
| Manufacture of other transport equipment                 | 50          | 800         | 2,250     | 9,000      | 35             | 20                                   | -                |
| Printing and reproduction of recorded media              | 600         | 500         | 1,250     | 6,000      | 30             | 40                                   | 5                |
| Manufacture of textiles                                  | 175         | 175         | 400       | 2,000      | 15             | 100                                  | 75               |
| Manufacture of paper and paper products                  | 200         | 175         | 700       | 5,000      | 10             | 40                                   | 40               |
| Manufacture of basic pharmaceutical products             | 25          | 800         | 125       | 5,000      | 10             | -                                    | -                |
| Manufacture of tobacco products                          | -           | -           | -         | 10         | -              | -                                    | -                |
| Manufacture of leather and related products              | 15          | 45          | 35        | 225        | -              | 20                                   | -                |
| Manufacture of coke and refined petroleum products       | -           | 150         | 1,000     | 1,500      | -              | -                                    | -                |
| Manufacture of basic metals                              | 250         | 150         | 500       | 2,500      | -              | 300                                  | -                |

53. Nomis: Business Register and Employment Survey : open access 2023

# EMPLOYMENT

Table 27 – Technology intensity of manufacturing jobs in the South Downs National Park and comparator National Parks. By number of jobs and share of total jobs 2023 <sup>54</sup>

| Classification of manufacturing jobs | South Downs NP |              | All English National Parks (Ex SDNP) |       | Lake District NP |       |
|--------------------------------------|----------------|--------------|--------------------------------------|-------|------------------|-------|
|                                      | No.            | %            | No.                                  | %     | No.              | %     |
| Medium to High Tech Manufacturing    | <b>3,595</b>   | <b>57.4%</b> | 870                                  | 16.9% | 45               | 5.8%  |
| Low Tech Manufacturing               | <b>1,770</b>   | <b>28.3%</b> | 2,345                                | 45.6% | 625              | 80.1% |
| Low to Medium Tech Manufacturing     | <b>650</b>     | <b>10.4%</b> | 1,675                                | 32.6% | 35               | 4.5%  |
| High Tech Manufacturing              | <b>250</b>     | <b>4.0%</b>  | 250                                  | 4.9%  | 75               | 9.6%  |
| Medium Tech Manufacturing            | -              | <b>0.0%</b>  | -                                    | 0.0%  | -                | 0.0%  |

54. Nomis: Business Register and Employment Survey : open access 2023

# EMPLOYMENT

## PUBLIC SECTOR

Table 28 – Number of jobs in Public administration & defence and Education sectors and share of total employment in the South Downs National Park 2016 & 2020 – 2023 <sup>55</sup>

| Industry                        | 2016          |              | 2020          |              | 2021          |              | 2022          |              | 2023          |              |
|---------------------------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|
|                                 | No.           | % share      | No.           | % share      | No.           | % share      | No.           | % share      | No.           | % share      |
| Public administration & defence | 3,000         | 5.6%         | 4,500         | 8.2%         | 4,000         | 7.2%         | 5,000         | 8.4%         | 4,500         | 7.5%         |
| Education                       | 5,000         | 9.4%         | 5,000         | 9.1%         | 5,000         | 9.0%         | 5,000         | 8.4%         | 6,000         | 10.0%        |
| Health                          | 5,000         | 9.4%         | 5,000         | 9.1%         | 5,000         | 9.0%         | 5,000         | 8.4%         | 6,000         | 10.0%        |
| <b>TOTAL</b>                    | <b>13,000</b> | <b>24.4%</b> | <b>14,500</b> | <b>26.4%</b> | <b>14,000</b> | <b>25.2%</b> | <b>15,000</b> | <b>25.2%</b> | <b>16,500</b> | <b>27.5%</b> |

55. Nomis: Business Register and Employment Survey public/private sector : open access 2023

# POPULATION



# POPULATION

## POPULATION CHANGE

Population growth in the South Downs National Park (SDNP) has been modest in recent years, increasing by just 0.5% between 2019 and 2023 (figure 15 and table 29). This is slower than in West Sussex (2.4%) and East Sussex (1.1%), but it is higher than other National Parks, many of which have seen decline over the past 8 years. This suggests that the South Downs may be better placed to retain residents, though this could also reflect its partial overlap with larger population centres and commuter belts, rather than any intrinsic demographic pull.

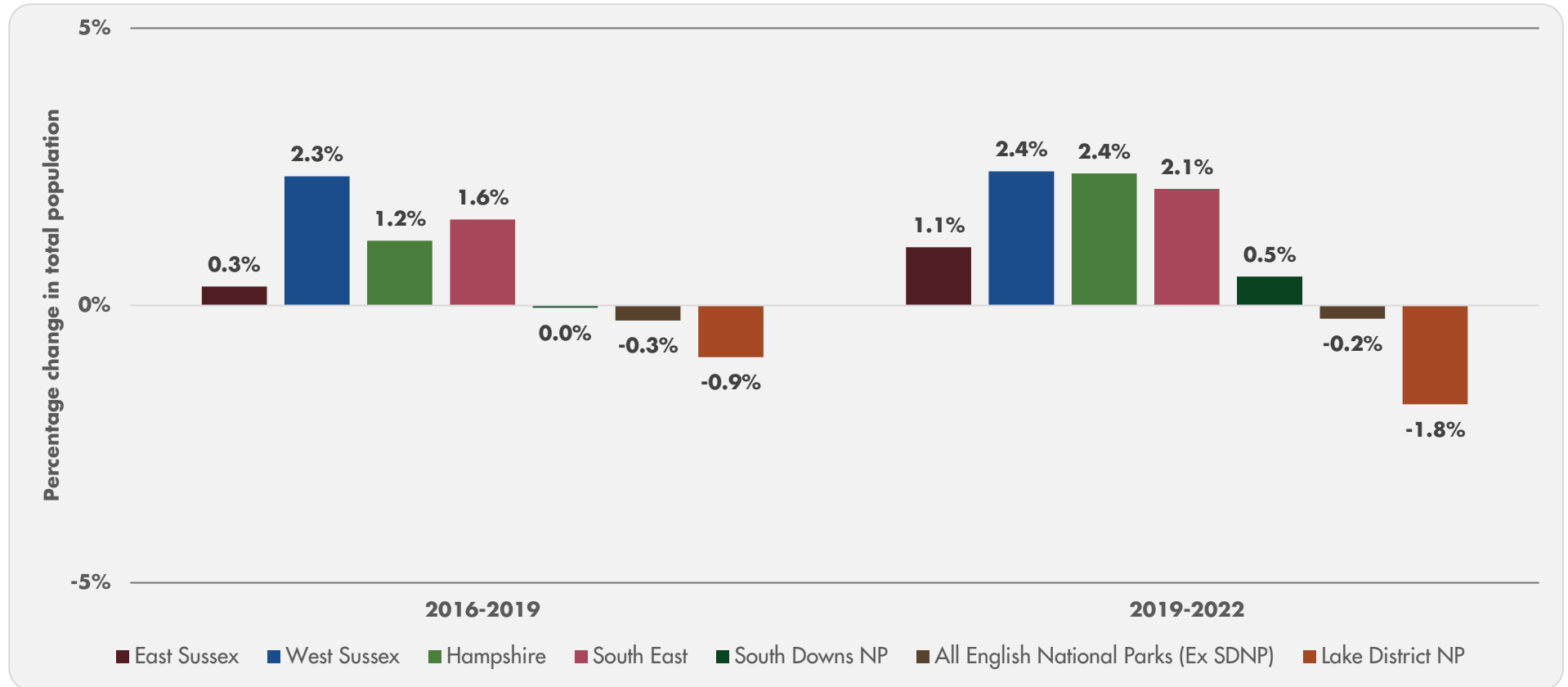
However, these patterns of population change broadly mirror wider national trends and should be interpreted with caution. The South Downs is not unique in experiencing slow growth, or in seeing the share of under-15s fall while the 65+ cohort rises. These demographic shifts are characteristic of many parts of the UK and

raise familiar challenges, from labour force pressures to the sustainability of local services.

What may differentiate the SDNP, however, is how these demographic changes intersect with the South Downs' economic strengths and constraints. The National Park appears to be good at attracting or retaining older, often more affluent residents. While this contributes to economic stability and spending power, it can also limit housing options and restrict the availability of younger, working-age residents. Understanding population change in the SDNP therefore requires looking past headline figures and considering how demographic composition may influence workforce supply, service demands and future sustainability.

# POPULATION

Figure 15 – Percentage change in total population over the periods 2016 - 2019 and 2019 - 2022 in the South Downs National Park and comparator areas <sup>56</sup>



56. Nomis: Annual population survey 2025 & Population estimates - local authority based by five year age band

# POPULATION

Table 29 – Total population in the South Downs National Park and comparator areas 2016 – 2022 <sup>57</sup>

| Date        | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|-------------|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| <b>2016</b> | 543,389     | 851,868     | 1,368,397 | 9,053,011  | <b>115,593</b> | 192,806                              | 37,439           |
| <b>2017</b> | 544,697     | 859,537     | 1,373,783 | 9,105,076  | <b>115,645</b> | 193,095                              | 37,433           |
| <b>2018</b> | 544,719     | 866,248     | 1,378,177 | 9,150,245  | <b>115,965</b> | 192,511                              | 37,229           |
| <b>2019</b> | 545,261     | 871,740     | 1,384,378 | 9,193,770  | <b>115,542</b> | 192,283                              | 37,090           |
| <b>2020</b> | 544,582     | 875,354     | 1,391,311 | 9,225,273  | <b>115,169</b> | 191,562                              | 36,811           |
| <b>2021</b> | 546,861     | 885,048     | 1,406,110 | 9,295,829  | <b>115,892</b> | 191,938                              | 36,692           |
| <b>2022</b> | 551,007     | 892,807     | 1,417,257 | 9,387,286  | <b>116,144</b> | 191,812                              | 36,431           |

57. Nomis: Annual population survey 2025 & Population estimates - local authority based by five year age band

# POPULATION

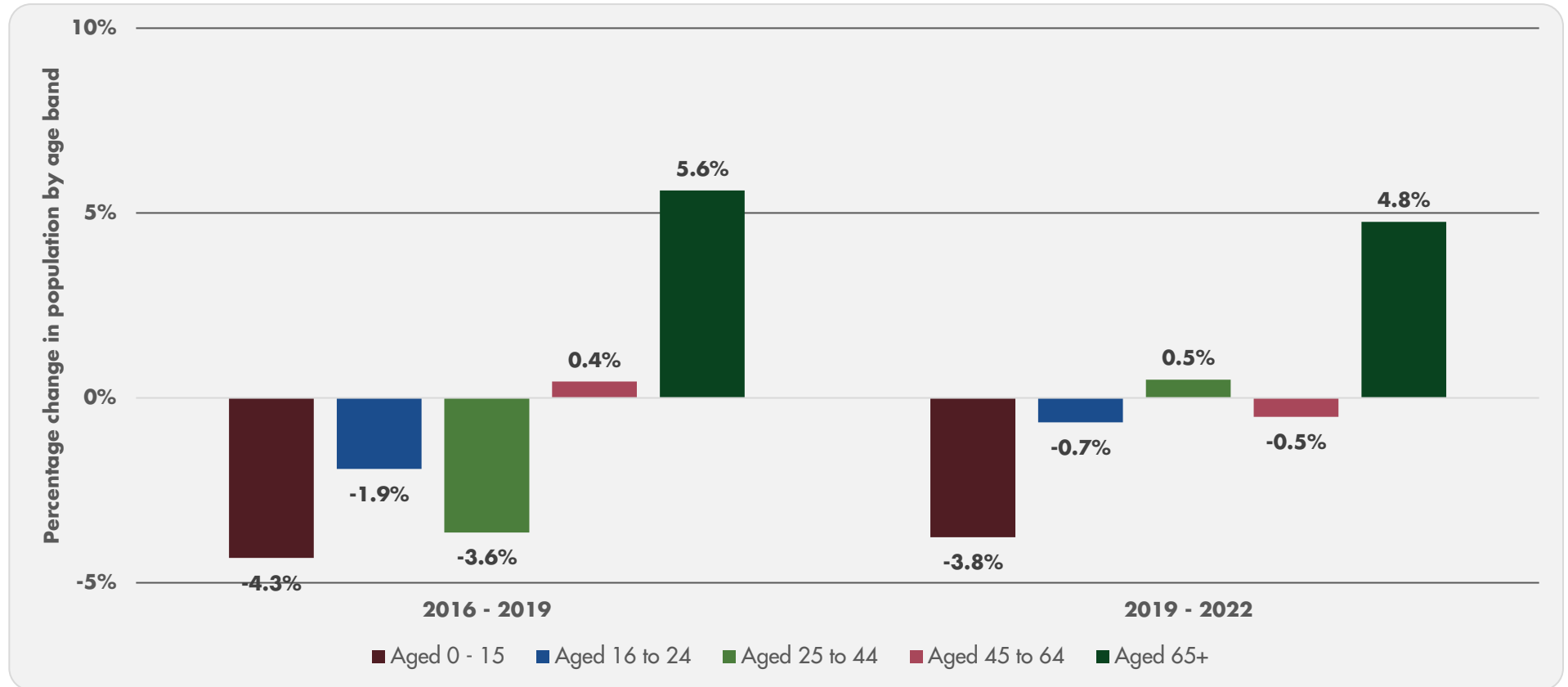
Table 30 – Share of total population by age band in the South Downs National Park 2016 – 2022 <sup>58</sup>

| Date        | Aged 0 - 15 |         | Aged 16 to 24 |         | Aged 25 to 44 |         | Aged 45 to 64 |         | Aged 65+ |         |
|-------------|-------------|---------|---------------|---------|---------------|---------|---------------|---------|----------|---------|
|             | No.         | % share | No.           | % share | No.           | % share | No.           | % share | No.      | % share |
| <b>2016</b> | 19,974      | 17.3%   | 9,697         | 8.4%    | 21,682        | 18.8%   | 35,114        | 30.4%   | 29,126   | 25.2%   |
| <b>2017</b> | 19,704      | 17.0%   | 9,592         | 8.3%    | 21,392        | 18.5%   | 35,321        | 30.5%   | 29,636   | 25.6%   |
| <b>2018</b> | 19,480      | 16.8%   | 9,542         | 8.2%    | 21,259        | 18.3%   | 35,471        | 30.6%   | 30,213   | 26.1%   |
| <b>2019</b> | 19,110      | 16.5%   | 9,511         | 8.2%    | 20,893        | 18.1%   | 35,269        | 30.5%   | 30,759   | 26.6%   |
| <b>2020</b> | 18,674      | 16.2%   | 9,451         | 8.2%    | 20,733        | 18.0%   | 35,201        | 30.6%   | 31,110   | 27.0%   |
| <b>2021</b> | 18,452      | 15.9%   | 9,494         | 8.2%    | 20,929        | 18.1%   | 35,185        | 30.4%   | 31,832   | 27.5%   |
| <b>2022</b> | 18,389      | 15.8%   | 9,448         | 8.1%    | 20,996        | 18.1%   | 35,089        | 30.2%   | 32,222   | 27.7%   |

58. Nomis: Annual population survey 2025 & Population estimates - local authority based by five year age band

# POPULATION

Figure 16 – Change in population by age band in the South Downs National Park 2016 - 2019 & 2019 - 2022 <sup>59</sup>



59. Nomis: Annual population survey 2025 & Population estimates - local authority based by five year age band

# POPULATION

## HOUSEHOLD DEPRIVATION

Household deprivation is a multi-dimensional measure used in the Census to assess relative disadvantage based on four criteria: education, employment, health, and housing. A household is considered deprived in a dimension if it meets specific thresholds. For example, if any adult is either unemployed or economically inactive due to long-term sickness or disability; or if accommodation is overcrowded, in a shared dwelling, or has no central heating.

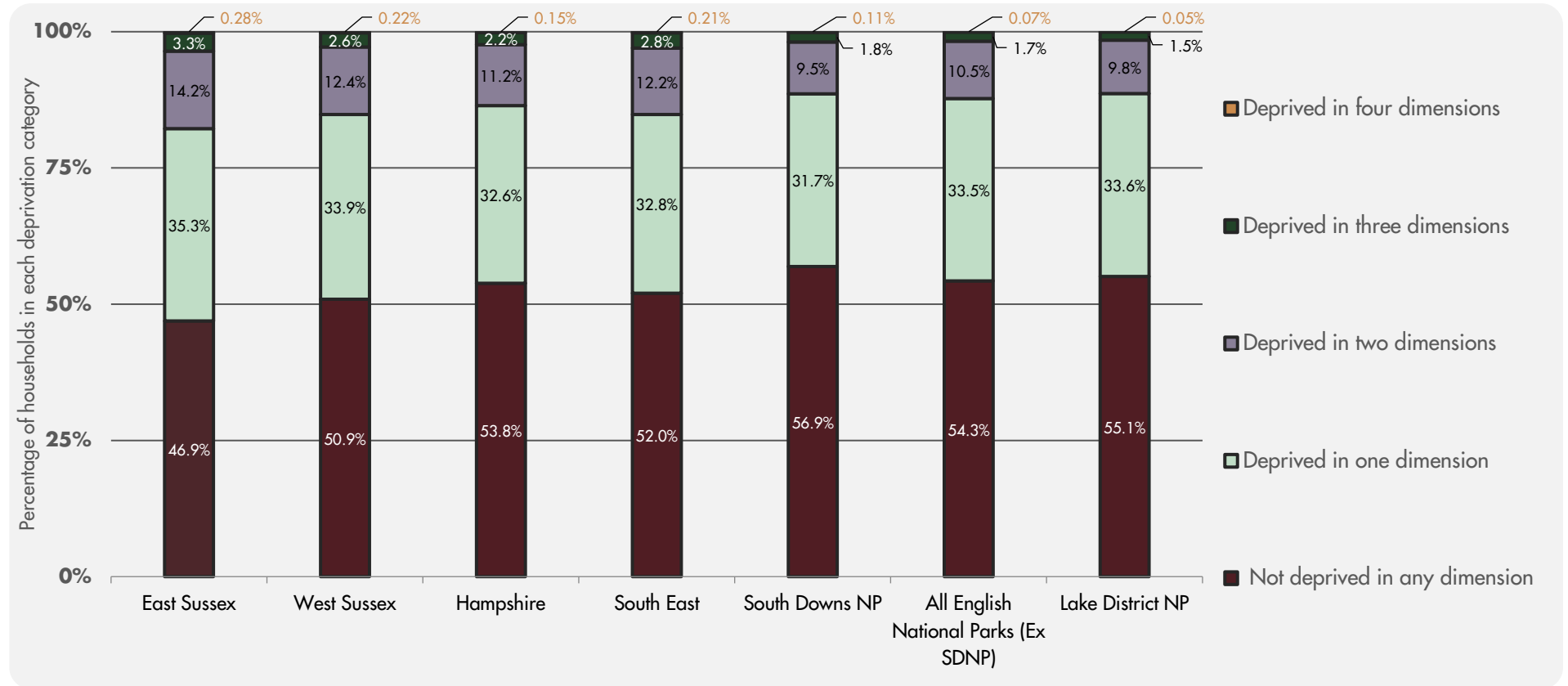
The 2021 deprivation data paints a picture of relative affluence and stability in the South Downs. While no area is entirely without challenge, households here are less likely to face overlapping disadvantages than those in surrounding counties or in other National Parks (figure 17). Nearly 57% of households in the SDNP are not deprived in any dimension, the highest proportion of all comparators. It is above the

South East (52%) and significantly above East Sussex (46.9%).

At the other end of the scale, 1.91% of SDNP households are deprived in three or four dimensions. This is a lower share than in any neighbouring county, though slightly higher than in other English National Parks (1.77%) and the Lake District (1.55%).

# POPULATION

Figure 17 – Distribution of Household Deprivation Across South Downs National Park and Comparator Areas, 2021. Proportion of households by number of deprivation dimensions (education, employment, health, and housing).<sup>60 61</sup>



60. Census 2021, Office for National Statistics

61. There is no comparison over time as ONS states: This variable cannot be compared with the Household deprivation variable used in the 2011 Census. This is because there have been changes to the variables used to calculate this measure, particularly in the education and housing dimensions.

# POPULATION

## HOUSE PRICES

Between 2016 and 2020, house prices in the South Downs National Park increased by 14.6%, a rate lower than the South East average (16.8%) and below all three comparator local authorities.

However, post-2020, the pace of change accelerated dramatically in the SDNP. From 2020 to 2022, house prices rose by 19.1%, almost twice the rate of the South East average (10.1%) and outpacing all neighbouring counties.

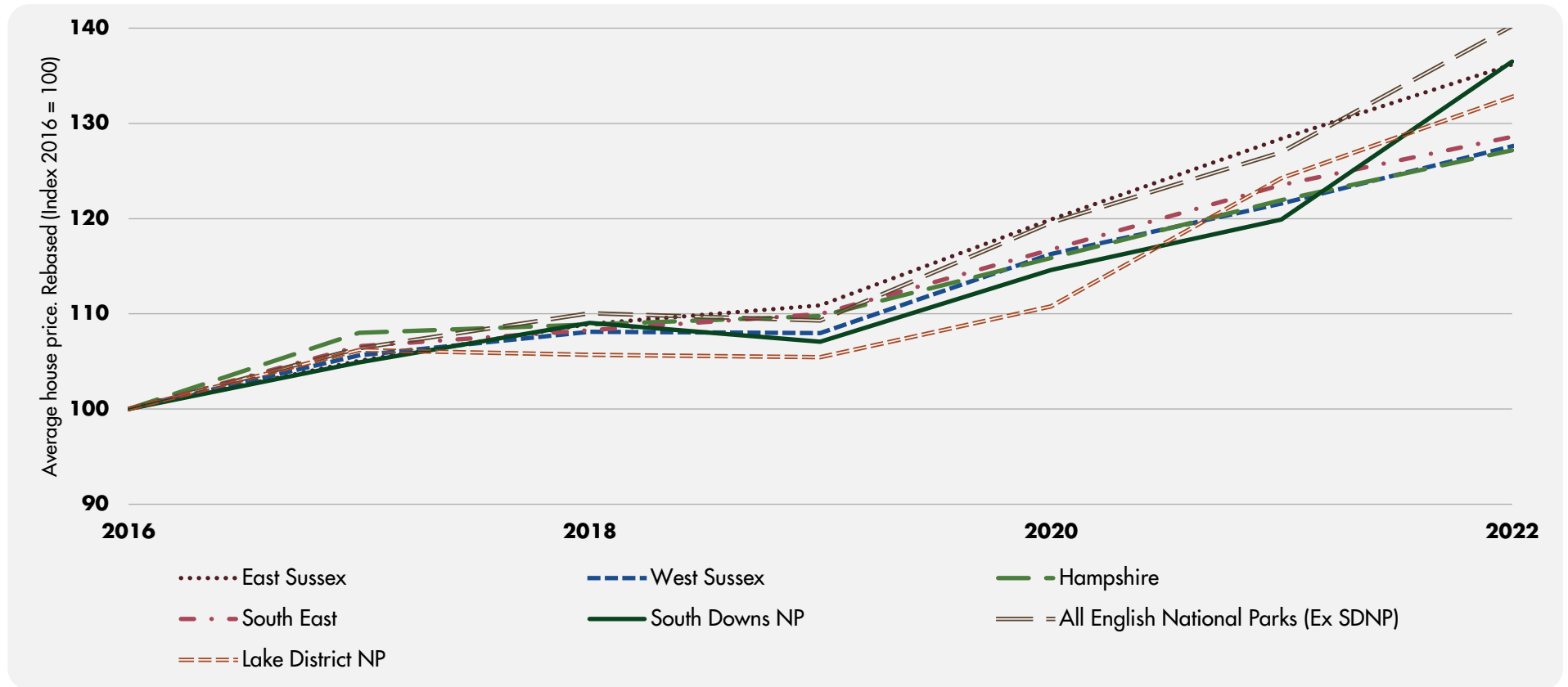
This shift mirrors patterns seen across other National Parks. The data suggests an intensified demand for rural and scenic living environments in the wake of the pandemic, as flexible working patterns and lifestyle preferences shifted. This makes the area a very challenging place to access the housing market. This trajectory

closely mirrors East Sussex's growth rate (36.2%) but not only is the price increase above average, it starts from a much higher base, compounding affordability pressures over time.

The South Downs started and remained the most expensive across all comparison areas. Its 2022 average house price was £611,656, 43% more expensive than the national park average across England (£427,847), and 75% higher than East Sussex, the least expensive local authority comparator (£350,000). Although growth rates are not extreme by regional standards, the absolute price levels continue to pose significant barriers for younger and lower-income residents.

# POPULATION

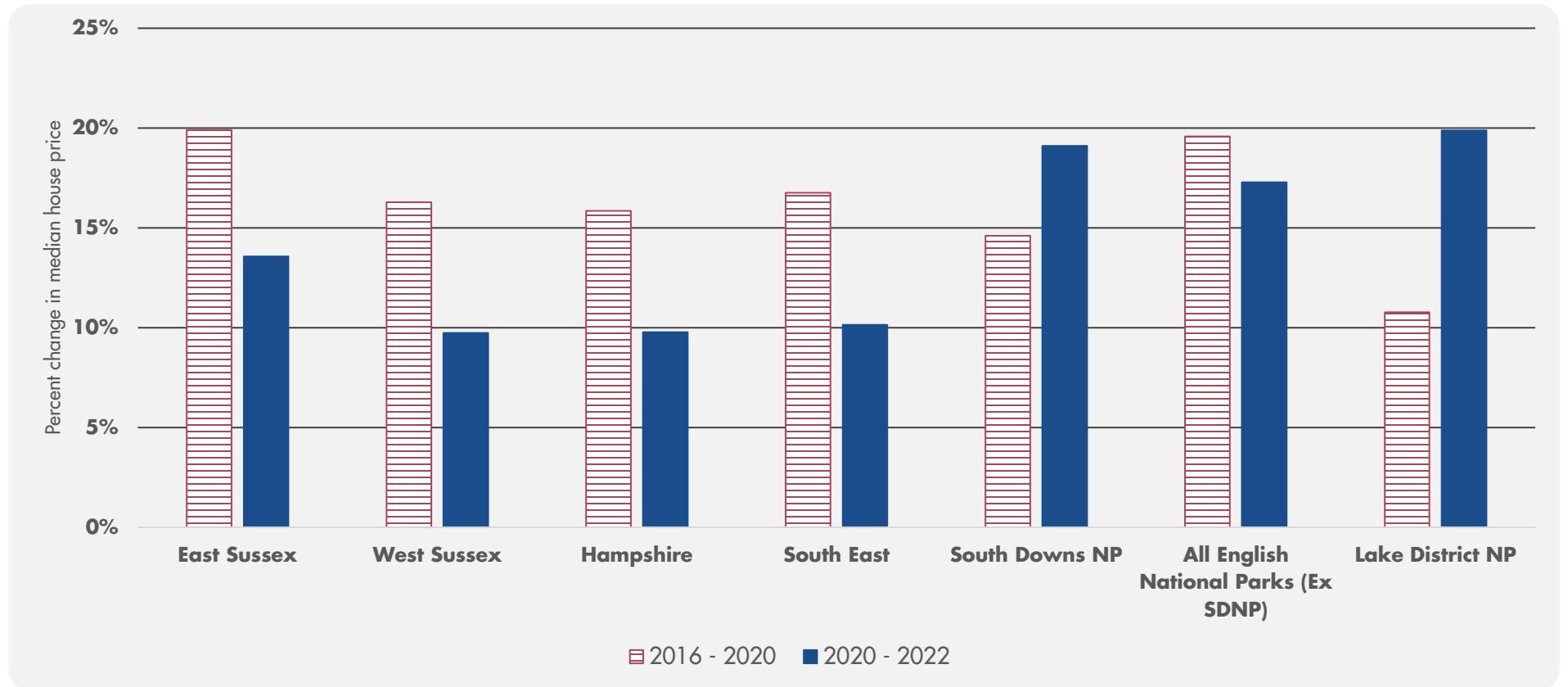
Figure 18 – Median price paid for residential property in The South Downs National Park and comparator areas, 2016 - 2022. Rebased (Index 2016 = 100) <sup>62</sup>



62. Median house prices by lower layer super output area: House price statistics for small areas in England and Wales (HPSSA). ONS. September 2023

# POPULATION

Figure 19 – Change in median price paid for residential property in the South Downs National Park and comparator areas 2016 - 2020 and 2020 – 2022 <sup>63</sup>



63. Median house prices by lower layer super output area: House price statistics for small areas in England and Wales (HPSSA). ONS. September 2023

# POPULATION

Table 31 – Median price paid for residential property in the South Downs National Park and comparator areas 2016 - 2022 and percentage change over that period

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|                             | East Sussex | West Sussex | Hampshire | South East | South Downs NP  | All English National Parks (Ex SDNP) | Lake District NP |
|-----------------------------|-------------|-------------|-----------|------------|-----------------|--------------------------------------|------------------|
| <b>2016 House Price</b>     | £257,000    | £301,000    | £287,000  | £295,500   | <b>£448,110</b> | £305,113                             | £278,375         |
| <b>2020 House Price</b>     | £308,173    | £350,000    | £332,500  | £345,000   | <b>£513,521</b> | £364,835                             | £308,359         |
| <b>2022 House Price</b>     | £350,000    | £384,084    | £365,000  | £380,000   | <b>£611,656</b> | £427,874                             | £369,660         |
| <b>% Change 2016 - 2020</b> | 19.9%       | 16.3%       | 15.9%     | 16.8%      | <b>14.6%</b>    | 19.6%                                | 10.8%            |
| <b>% Change 2020 - 2022</b> | 13.6%       | 9.7%        | 9.8%      | 10.1%      | <b>19.1%</b>    | 17.3%                                | 19.9%            |

64. Median house prices by lower layer super output area: House price statistics for small areas in England and Wales (HPSSA). ONS. September 2023

# OUTPUT AND PRODUCTIVITY



# OUTPUT AND PRODUCTIVITY

## GROSS VALUE ADDED (GVA) AND GVA PER HEAD

Between 2016 and 2023, Gross Value Added (GVA) in the South Downs National Park grew by 36.5%, marginally ahead of the South East average (35.8%) and higher than in West Sussex (32.3%) and Hampshire (33.2%) (table 32).

GVA per head has also grown at a slightly faster rate than the regional average, increasing by 8.5% from 2019 - 2022 percent compared to 7.8% across the South East region, 6.0% in Hampshire, 2.6% in West Sussex. This indicates a resilient and productive resident population, though the rate of change points more towards steady catch-up towards Hampshire and East Sussex that remain ahead.

Overall, these figures reflect a picture of quiet resilience. The South Downs economy continues to perform reliably, maintaining a balance between land-based

industries, manufacturing and professional services. Rather than outpacing others through rapid innovation, it has instead avoided deep shocks and sustained a path of modest upward growth.

| Period             | East Sussex | West Sussex | Hampshire | South East | South Downs NP |
|--------------------|-------------|-------------|-----------|------------|----------------|
| <b>2016 - 2019</b> | 9.4%        | 14.3%       | 14.0%     | 13.5%      | 14.7%          |
| <b>2019 - 2023</b> | 23.9%       | 15.7%       | 16.9%     | 19.7%      | 19.1%          |
| <b>2016 - 2023</b> | 35.6%       | 32.3%       | 33.2%     | 35.8%      | 36.5%          |

Table 32 – Change in GVA (balanced). Current Prices. For the South Downs National Park and comparator areas 2016 – 2023 <sup>65</sup>

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

# OUTPUT AND PRODUCTIVITY

Table 33 – Total Gross Value Added (balanced), Current Prices (GVA), and GVA per head for the South Downs National Park and comparator local authorities and region 2016 – 2022 <sup>66 67</sup>

| Year        | East Sussex GVA (£m) | East Sussex GVA per Head | West Sussex GVA (£m) | W Sussex GVA per Head | Hampshire GVA (£m) | Hampshire GVA per Head | South East GVA (£m) | South East GVA per Head | South Downs NP GVA (£m) | South Downs NP GVA per Head |
|-------------|----------------------|--------------------------|----------------------|-----------------------|--------------------|------------------------|---------------------|-------------------------|-------------------------|-----------------------------|
| <b>2016</b> | 8,536                | £15,709                  | 21,136               | £24,811               | 38,685             | £28,270                | 261,020             | £28,832                 | 2,810                   | £24,306                     |
| <b>2017</b> | 8,742                | £16,049                  | 22,318               | £25,965               | 40,100             | £29,189                | 270,869             | £29,749                 | 2,943                   | £25,453                     |
| <b>2018</b> | 8,933                | £16,399                  | 23,282               | £26,877               | 41,143             | £29,853                | 280,392             | £30,643                 | 3,058                   | £26,369                     |
| <b>2019</b> | 9,342                | £17,133                  | 24,167               | £27,723               | 44,101             | £31,856                | 296,236             | £32,221                 | 3,222                   | £27,885                     |
| <b>2020</b> | 9,219                | £16,929                  | 22,463               | £25,662               | 42,340             | £30,432                | 291,489             | £31,597                 | 3,108                   | £26,985                     |
| <b>2021</b> | 9,885                | £18,076                  | 23,670               | £26,744               | 44,748             | £31,824                | 303,745             | £32,675                 | 3,241                   | £27,965                     |
| <b>2022</b> | 10,545               | £19,138                  | 25,406               | £28,456               | 47,860             | £33,769                | 326,143             | £34,743                 | 3,515                   | £30,264                     |
| <b>2023</b> | 11,575               |                          | 27,962               |                       | 51,542             |                        | 354,500             |                         | 3,836                   |                             |

66. ONS: Regional gross value added (balanced) by industry: all ITL regions 2025 & Nomis: Annual population survey 2025 & Population estimates - local authority based by five year age band

67. Population data is only available up to 2022

# OUTPUT AND PRODUCTIVITY

## SECTORAL GVA

The South Downs stands out for its relatively strong contribution to GVA from professional and digital sectors, which exceed levels seen in both East and West Sussex. However, it still trails Hampshire and the wider South East, where larger urban centres drive greater overall productivity. This suggests that the SDNP occupies a middle ground: more economically diverse and productive than many rural areas, with a concentration of small but high-value firms, yet without the density or infrastructure of larger economic hubs (table 34).

Manufacturing also accounts for a larger share of output than might be expected in a rural area. The presence of key anchor firms and specialist producers, particularly in chemicals and food and drink, gives the SDNP a stronger manufacturing GVA footprint than some surrounding counties. Agriculture and the visitor economy remain important to the National Park's identity and employment, but contribute less to GVA overall. This mirrors a wider trend across rural parts of the South East, where these

sectors have a strong physical presence but a smaller role in terms of output.

Looking at the period between 2016 and 2020, GVA growth in the South Downs was relatively steady across most sectors (table 35). Manufacturing, real estate, and construction retained strong contributions to overall output, with small gains in sectors like professional services and information and communication. From 2020 to 2023, more dynamic shifts emerged. Human health and social work, education, and public administration & defence all recorded notable absolute growth. Accommodation and food services rebounded from their pandemic lows, growing their share from 2.5% to 3.2%, and construction also gained slightly in share. A standout trend is the doubling of GVA in utilities and waste management, rising from 2.1% to 4.0%. By contrast, professional services and information and communication grew in value but lost share.

# OUTPUT AND PRODUCTIVITY

Table 34 – Gross Value Added (balanced). Current Prices (GVA) by sector and % share of total GVA for South Downs National Park and comparator areas 2023

| Industry  | East Sussex |                      | West Sussex |                      | Hampshire |                      | South East |                      | South Downs NP |                      |
|---|-------------|----------------------|-------------|----------------------|-----------|----------------------|------------|----------------------|----------------|----------------------|
|   | GVA (£m)    | % Share of total GVA | GVA (£m)    | % Share of total GVA | GVA (£m)  | % Share of total GVA | GVA (£m)   | % Share of total GVA | GVA (£m)       | % Share of total GVA |
| Real estate activities                                  | 2,938       | 25.4%                | 5,794       | 20.7%                | 7,586     | 14.7%                | 54,605     | 15.4%                | <b>919</b>     | <b>23.9%</b>         |
| Wholesale and retail trade; repair of motor vehicles    | 1,074       | 9.3%                 | 2,482       | 8.9%                 | 6,880     | 13.3%                | 39,910     | 11.3%                | <b>397</b>     | <b>10.4%</b>         |
| Human health and social work activities                 | 1,334       | 11.5%                | 2,564       | 9.2%                 | 3,116     | 6.0%                 | 27,147     | 7.7%                 | <b>294</b>     | <b>7.7%</b>          |
| Education   | 920         | 7.9%                 | 1,676       | 6.0%                 | 2,436     | 4.7%                 | 24,292     | 6.9%                 | <b>291</b>     | <b>7.6%</b>          |
| Public administration and defence                       | 763         | 6.6%                 | 1,042       | 3.7%                 | 3,137     | 6.1%                 | 16,483     | 4.6%                 | <b>288</b>     | <b>7.5%</b>          |
| Manufacturing   | 878         | 7.6%                 | 3,438       | 12.3%                | 4,369     | 8.5%                 | 26,586     | 7.5%                 | <b>275</b>     | <b>7.2%</b>          |
| Construction  | 981         | 8.5%                 | 1,911       | 6.8%                 | 3,460     | 6.7%                 | 23,963     | 6.8%                 | <b>266</b>     | <b>6.9%</b>          |
| Professional, scientific and technical activities       | 441         | 3.8%                 | 1,413       | 5.1%                 | 4,727     | 9.2%                 | 29,653     | 8.4%                 | <b>194</b>     | <b>5.1%</b>          |
| Information and communication                           | 210         | 1.8%                 | 834         | 3.0%                 | 3,293     | 6.4%                 | 27,040     | 7.6%                 | <b>183</b>     | <b>4.8%</b>          |
| Electricity, gas, water; sewerage and waste management  | 356         | 3.1%                 | 563         | 2.0%                 | 1,075     | 2.1%                 | 10,142     | 2.9%                 | <b>155</b>     | <b>4.0%</b>          |
| Accommodation and food service activities               | 471         | 4.1%                 | 1,092       | 3.9%                 | 1,272     | 2.5%                 | 10,046     | 2.8%                 | <b>123</b>     | <b>3.2%</b>          |
| Administrative and support service activities           | 308         | 2.7%                 | 1,363       | 4.9%                 | 3,438     | 6.7%                 | 18,767     | 5.3%                 | <b>119</b>     | <b>3.1%</b>          |
| Transportation and storage                              | 247         | 2.1%                 | 1,770       | 6.3%                 | 1,324     | 2.6%                 | 12,535     | 3.5%                 | <b>91</b>      | <b>2.4%</b>          |
| Agriculture, forestry and fishing; mining and quarrying | 82          | 0.7%                 | 179         | 0.6%                 | 399       | 0.8%                 | 1,693      | 0.5%                 | <b>68</b>      | <b>1.8%</b>          |
| Arts, entertainment and recreation                      | 196         | 1.7%                 | 380         | 1.4%                 | 561       | 1.1%                 | 5,151      | 1.5%                 | <b>65</b>      | <b>1.7%</b>          |
| Other service activities                                | 267         | 2.3%                 | 367         | 1.3%                 | 1,373     | 2.7%                 | 6,659      | 1.9%                 | <b>63</b>      | <b>1.6%</b>          |
| Financial and insurance activities                      | 98          | 0.8%                 | 1,078       | 3.9%                 | 3,017     | 5.9%                 | 19,480     | 5.5%                 | <b>41</b>      | <b>1.1%</b>          |

68. ONS: Regional gross value added (balanced) by industry: all ITL regions 2025  
69 excludes "activities of households"

# OUTPUT AND PRODUCTIVITY

Table 35 – Gross Value Added (balanced). Current Prices (GVA) by sector and % share of total GVA for South Downs National Park 2016 – 2023 <sup>70</sup>

| Industry  | 2016     |                      | 2020     |                      | 2023     |                      |
|---|----------|----------------------|----------|----------------------|----------|----------------------|
|   | GVA (£m) | % Share of total GVA | GVA (£m) | % Share of total GVA | GVA (£m) | % Share of total GVA |
| Real estate activities                                  | 690      | 24.6%                | 741      | 23.8%                | 919      | 23.9%                |
| Wholesale and retail trade; repair of motor vehicles    | 279      | 9.9%                 | 339      | 10.9%                | 397      | 10.4%                |
| Human health and social work activities                 | 213      | 7.6%                 | 232      | 7.5%                 | 294      | 7.7%                 |
| Education   | 211      | 7.5%                 | 242      | 7.8%                 | 291      | 7.6%                 |
| Public administration and defence                       | 171      | 6.1%                 | 226      | 7.3%                 | 288      | 7.5%                 |
| Manufacturing   | 251      | 8.9%                 | 282      | 9.1%                 | 275      | 7.2%                 |
| Construction  | 188      | 6.7%                 | 191      | 6.2%                 | 266      | 6.9%                 |
| Professional, scientific and technical activities       | 150      | 5.4%                 | 177      | 5.7%                 | 194      | 5.1%                 |
| Information and communication                           | 135      | 4.8%                 | 162      | 5.2%                 | 183      | 4.8%                 |
| Electricity, gas, water; sewerage and waste management  | 56       | 2.0%                 | 66       | 2.1%                 | 155      | 4.0%                 |
| Accommodation and food service activities               | 105      | 3.7%                 | 78       | 2.5%                 | 123      | 3.2%                 |
| Administrative and support service activities           | 98       | 3.5%                 | 86       | 2.8%                 | 119      | 3.1%                 |
| Transportation and storage                              | 54       | 1.9%                 | 57       | 1.8%                 | 91       | 2.4%                 |
| Agriculture, forestry and fishing; mining and quarrying | 36       | 1.3%                 | 40       | 1.3%                 | 68       | 1.8%                 |
| Arts, entertainment and recreation                      | 45       | 1.6%                 | 46       | 1.5%                 | 65       | 1.7%                 |
| Other service activities                                | 53       | 1.9%                 | 51       | 1.6%                 | 63       | 1.6%                 |
| Financial and insurance activities                      | 63       | 2.2%                 | 83       | 2.7%                 | 41       | 1.1%                 |
| Activities of households                                | 11       | 0.4%                 | 10       | 0.3%                 | 5        | 0.1%                 |

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

# OUTPUT AND PRODUCTIVITY

## TRAVEL TO WORK

Travel to Work Areas (TTWAs) are statistical geography units developed by the Office for National Statistics to represent self-contained labour market areas. Defined using census data on commuting patterns, each TTWA is drawn to meet a 75% self-containment rule: at least three-quarters of the economically active residents also work within the same area, and at least three-quarters of people who work in the area also live there. This approach identifies economic geographies that reflect where people actually live and work, rather than following administrative boundaries. TTWAs therefore offer a consistent way to understand local employment dynamics and travel patterns.

For this report, each LSOA within the South Downs National Park has been matched to its corresponding TTWA. This provides a picture of the spatial labour market affiliations of communities within the National Park boundary (table 36).

The largest shares of SDNP residents fall within the Portsmouth and Chichester & Bognor Regis TTWAs (each 26.5%), with others linked to Eastbourne, Guildford and Aldershot, Southampton, and more. Together, this forms an arc of coastal and market towns that act as employment hubs for SDNP communities.

However, it's important not to overstate these commuting connections. By 2021, over 42% of employed SDNP residents were mainly working from home (table 37). This is the highest proportion among comparator areas, and more than double the rate recorded in 2011. While the 2021 figure was likely inflated by pandemic-related restrictions at the time of the census, it nonetheless signals a shift in how residents interact with local labour markets. It also suggests that the high number of professional and technical businesses in the National Park may be more reliant on remote or national markets, rather than on proximity to traditional commuter destinations in the area.

# OUTPUT AND PRODUCTIVITY

Table 36 – Distribution of South Downs National Park Lower Super Output Areas (LSOAs) across Travel to Work Areas (TTWAs), by percentage share <sup>71</sup>

| Travel to Work Area (TTWA)  | Percentage of South Downs National Park distributed across TTWAs |
|-----------------------------|--|
| Brighton                    | 4.4%   |
| Eastbourne                  | 19.1%  |
| Guildford and Aldershot     | 8.8%   |
| Portsmouth                  | 26.5%  |
| Southampton                 | 7.4%   |
| Chichester and Bognor Regis | 26.5%  |
| Worthing                    | 2.9%   |
| Crawley                     | 4.4%   |

Table 37 – Percentage of residents aged 16 years and over in employment that “work mainly from home” from 2011 and 2021 census <sup>72</sup>

| Year        | East Sussex | West Sussex | Hampshire | South East | South Downs NP | All English National Parks (Ex SDNP) | Lake District NP |
|-------------|-------------|-------------|-----------|------------|----------------|--------------------------------------|------------------|
| <b>2011</b> | 13.9%       | 12.2%       | 11.6%     | 11.8%      | 19.7%          | 25.7%                                | 28.5%            |
| <b>2021</b> | 31.1%       | 33.3%       | 34.8%     | 35.8%      | 42.8%          | 37.4%                                | 34.0%            |

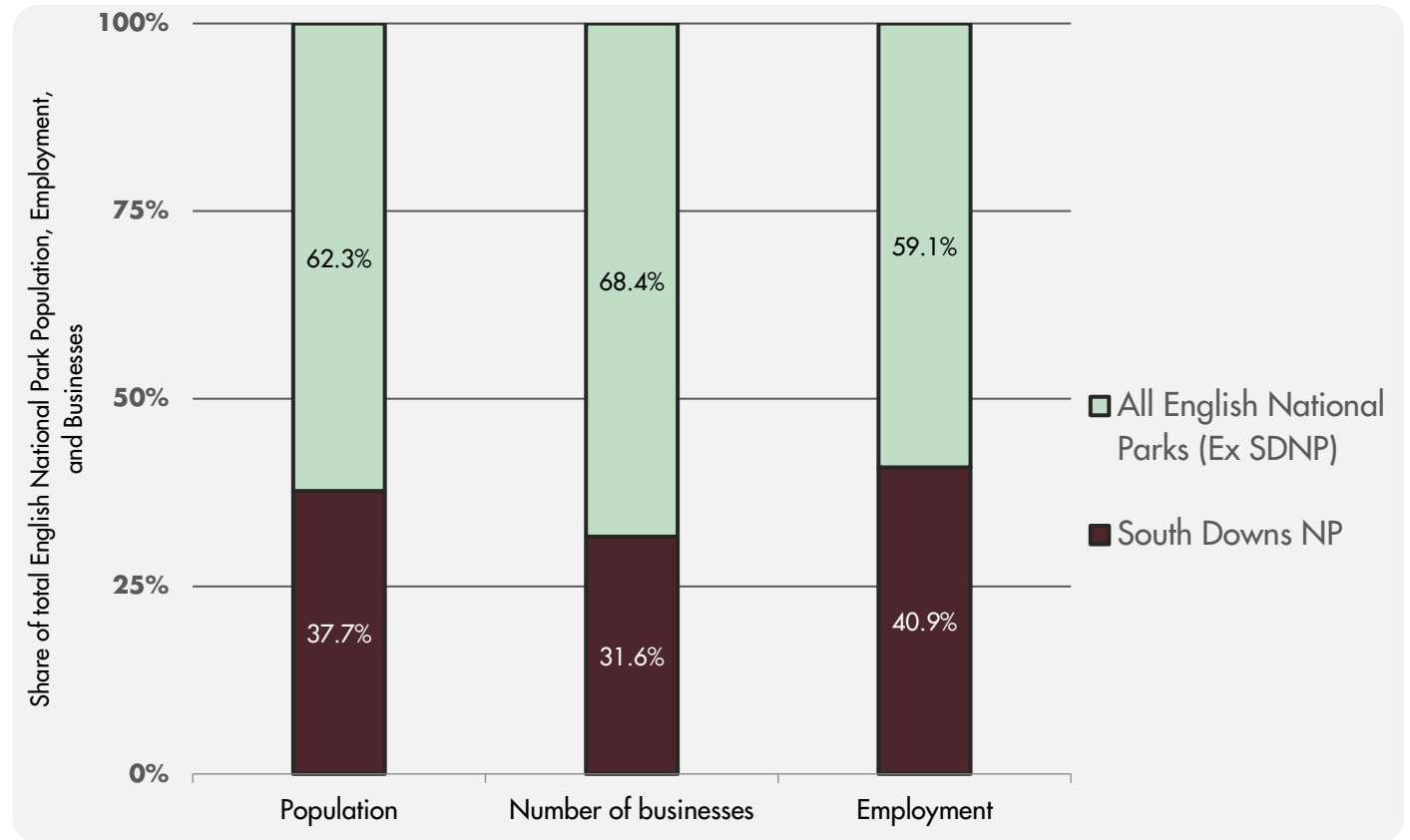
71. Lower Layer Super Output Area (2011) to Travel to Work Area (December 2011) lookup, ONS. June 2020. UK Open Geography Portal

72. ONS: Census 2011 & 2021, Distance travelled to work

# COMPARISON WITH OTHER NATIONAL PARKS

Figure 20 – South Downs National Park share of Population, Employment, and Businesses compared to other National Parks 2022-23 <sup>73</sup>

The South Downs National Park stands out as the most economically active of the 10 National Parks in England. It is home to 38% of the total population across all Parks and supports just under 41% of total employment. Its share of business counts (32%) is the largest, although proportionally lower than its share of population. The South Downs does have a slightly higher share of medium and large firms than other National Parks that may account for this.



73. Nomis: Annual population survey 2025; Nomis: UK Business Counts - enterprises by industry and employment size band 2024; Nomis: Annual population survey 2025