

SOUTH DOWNS NATIONAL PARK VISITOR ACCOMMODATION REVIEW



Image 1 – Ditchling Beacon (Shutterstock)

FINAL REPORT

Contents

1	EXECUTIVE SUMMARY	3
2	INTRODUCTION	6
3	NATIONAL, REGIONAL AND LOCAL CONTEXT	9
	VISITOR ECONOMY POLICY CONTEXT	9
	SOUTH DOWNS PARTNERSHIP MANAGEMENT PLAN (PMP) AND LOCAL PLAN REVIEW (LPR)	10
	UK TOURISM VOLUME AND VALUE	10
	UK CONSUMER TRENDS	12
	CURRENT ISSUES	13
4	VISITOR ACCOMMODATION IN THE NATIONAL PARK	16
	THE TOURISM ECONOMY – TRENDS SINCE 2014.....	16
	THE TOURISM ECONOMY IN 2025.....	17
	SERVICED ACCOMMODATION	18
	NON-SERVICED ACCOMMODATION.....	21
	THE SHARING ECONOMY.....	22
5	CURRENT PERFORMANCE.....	24
	UK ACCOMMODATION PERFORMANCE TRENDS.....	24
	ANNUAL OCCUPANCY AND AVERAGE DAILY RATE IN THE SOUTH DOWNS NATIONAL PARK	27
6	CONCLUSIONS.....	34
	KEY CHALLENGES	34
	KEY OPPORTUNITIES & OPTIONS	36
7	RECOMMENDATIONS	40
	STRATEGIC APPROACH & GOVERNANCE	40
	VISITOR MANAGEMENT.....	41
	BUSINESS NETWORK DEVELOPMENT	42
	ACCOMMODATION SUPPLY	43
8	APPENDICES	45
	APPENDIX I – TOURISM ECONOMY ACCOMMODATION BY NUMBER OF ESTABLISHMENTS, ROOMS AND BEDS	45
	APPENDIX II – DOMESTIC TOURISM VOLUMES TO NATIONAL PARKS IN 2019	46
	APPENDIX III – INDICATIVE DMO LANDSCAPE	47
	APPENDIX IV – TOURISM ECONOMY CLUSTERS.....	48
	APPENDIX V – TOURISM ECONOMY CLUSTERS BY SERVICED AND NON-SERVICED ACCOMMODATION.....	49
	APPENDIX VI – SHARING ECONOMY BY CLUSTERS AND NUMBER OF ROOMS.....	50
	APPENDIX VII – TOURISM ECONOMY SERVICED ACCOMMODATION AND VINEYARDS	51

TABLES

Table 1 – Accommodation Categories and Typical Sub-categories	8
Table 2 – Change in Tourism Economy Accommodation from the 2014 Audit.....	16
Table 3 – Tourism Economy Accommodation in South Downs National Park in 2025.....	17
Table 4 - Tourism Economy Visitor Accommodation in the South Downs National Park by County and District Areas	18
Table 5 – Key Sharing Economy Metrics.....	23
Table 6 – Total Accommodation Supply against Demand	33
Table 7 – Possible Approaches to Visitor Accommodation Development	37

FIGURES

Figure 1- Occupancy in 2024 across the random sample of South Downs accommodation businesses	28
Figure 2 – Grading of Accommodation	30
Figure 3 – Quality of Accommodation – Online Rating.....	30
Figure 4 – Purpose of Visit to South Downs National Park	32
Figure 5– Difference in scale, LVEPs and DMOs across selected National Parks.....	34

IMAGES

Image 1 – Ditchling Beacon (Shutterstock)	0
Image 2 – Entrance to the 35 Room Spread Eagle Hotel, Midhurst.....	19
Image 3 – Entrance to Premier Inn’s 47 Room Hotel, Petersfield	19
Image 4 – The Five Room Selsey Arms near West Dean, Chichester	20
Image 5 – The Central Facilities at Graffham’s Caravan & Camping Club Site	21
Image 6 – Lombard Street Airbnb, Petworth	22
Image 7 - South Downs Way signage on the B2141.....	38

All Images © 2025 Tomorrow’s Tourism Ltd or licensed from Shutterstock where indicated

1 Executive Summary

- 1.1 Tomorrow's Tourism has been commissioned by the South Downs National Park Authority (SDNPA) to carry out a review of visitor accommodation in the South Downs National Park (SDNP) in order to support the preparation of the South Downs Partnership Management Plan (PMP) and South Downs Local Plan Review (LPR). In doing so, this report: considers the national, regional and local context; includes an asset audit of the quantity and type of visitor accommodation in the National Park; analyses the latest accommodation trends; and analyses the current performance of a sample of accommodation providers operating in the National Park.
- 1.2 The report distinguishes between visitor accommodation offered by the professional sector (typically those registered businesses that may employ staff or pay VAT) and visitor accommodation offered by properties that use sales channels such as Airbnb (who are more likely to be operated by individuals). The former group is termed the **Tourism Economy** while the latter is defined as the **Sharing Economy**.
- 1.3 A South Downs Visitor Accommodation Review was previously carried out in 2014 by Hotel Solutions on behalf of the SDNPA. The 2014 review provided a baseline of 452 accommodation establishments of all types across the National Park. At the time, it was concluded that the National Park did not have enough visitor accommodation in the context of growing visitor numbers.
- 1.4 Today, in 2025, there are 313 (professional) establishments operating as part of the Tourism Economy, and a further 1,903 (usually small) establishments that traded during the last 12 months as part of the Sharing Economy. The latter has seen very significant growth from a low base since Airbnb began in the UK from around 2012. The type of accommodation offered in the National Park has also changed to reflect market preferences, with the serviced offer (such as hotels and B&Bs) declining in favour of the non-serviced offer (such as self-catering cottages). **In total, there are 2,216 establishments offering 7,203 rooms (or pitches, in the case of camping and caravan sites) with up to 19,057 bedspaces.** This is over double the number of bedspaces compared with 2014. In terms of accommodation by the county areas of the National Park, 30% is in Hampshire, 44% is in West Sussex, and 26% is in East Sussex. As for the district areas of the National Park, Chichester District has the highest number of Tourism Economy businesses.
- 1.5 The South Downs National Park sees some 19 million visits a year (the second highest of any of the UK's National Parks) but only a very small proportion of these visitors

stay overnight. Staying visitor numbers have recently dropped as a result of the cost-of-living crisis, with day trips finding more favour due to discretionary incomes being squeezed. Visitor numbers staying in serviced accommodation reduced by almost 10% between 2022 and 2023, with visitor numbers to non-serviced accommodation seeing an even more significant fall of over 20%.¹ Visitor numbers are still some way behind the numbers seen prior to the COVID-19 pandemic. There remain, however, issues of congestion and visitor pressure at certain popular destinations.

- 1.6 Despite these short-term fluctuations, there is excellent long-term market potential as visitors increasingly seek breaks in rural destinations to relax, unwind, and participate in a wide range of pursuits. The National Park already plays an important role as a sanctuary from fast-moving lifestyles in an exceptional natural environment, and interest is likely to grow over the next decade as health and wellbeing becomes as important as culture and heritage as a trip motivator. This potential can be seen across formats, including hotels, holiday rentals and camping, with glamping likely to grow further in popularity.
- 1.7 The performance of visitor accommodation varies and reflects the motivations of many operators, some of which are professional businesses, some are lifestyle businesses, and others may be using accommodation as an adjunct to another business. In 2024, the indicative average occupancy rate from a sample of Tourism Economy accommodation businesses was 59%, somewhat lower than the 64% average for serviced accommodation businesses across South East England. The Average Day Rate for the Tourism Economy businesses in the National Park was £106. Occupancy over the same period for Sharing Economy accommodation was 52%. The Quality of the offer is generally high but could still be better when compared to other parts of the UK. Leisure represents the main trip purpose for 63% of staying visitors while a further 15% use paid for accommodation when visiting friends and relatives.
- 1.8 The key challenges for the visitor economy - and the SDNPA and its partners - include: the congestion and visitor pressure at key sites; the successful governance of a highly fragmented sector operating across a large area; and the ability to connect up and improve the performance of a very disparate and large number of small businesses. The market will undoubtedly grow, with lots of accommodation set to profit from this growth, but it would be of much greater benefit for the National Park as a whole if this growth can be undertaken within a highly strategic partnership approach that is planned, agreed, adequately funded, and carefully monitored over the period of the new PMP and emerging LPR.

1 STEAM Report for 2016 – 2023, South Downs National Park, 17 September 2024

- 1.9 The visitor economy can provide jobs, income, and other benefits, such as giving an impetus to the sympathetic reuse and improvement of many heritage buildings. With a well-resourced plan, however, it can also be an important connector to assist with the delivery of many other key themes set out in the PMP and LPR including, but not limited to: accessibility, arts, economy, heritage, outdoor learning, sustainable transport (including active travel) and volunteering.

2 Introduction

- 2.1 Tomorrow’s Tourism was commissioned by the South Downs National Park Authority (SDNPA) in April 2025 to carry out a review of visitor accommodation in the South Downs National Park (SDNP) in order to support the preparation of the South Downs Partnership Management Plan (PMP) and South Downs Local Plan Review (LPR).
- 2.2 This report draws on, and summarises, a range of work. This includes a comprehensive audit of visitor accommodation, a survey of accommodation businesses, and a number of in-depth interviews with key stakeholders. The Asset Audit and the Survey Report are available as separate documents.
- 2.3 The objectives of the commission were to assess:
- The national, regional, and local context for visitor accommodation, including markets, performance, and trends;
 - A review of the current visitor accommodation within the National Park, mapped geographically and by type with key attractions and destinations;
 - A gap analysis to identify areas within the National Park where there may be an over or under supply of visitor accommodation (per type);
 - The identification of any “honeypots” and “hotspots”, and an analysis of how much, and what type of, accommodation is in proximity to these;
 - A profile, insight, and review of sustainably certified accommodation;
 - An analysis of affordable accommodation options (i.e., <£100 per night);
 - An analysis of accessible supply (accessibility);
 - An analysis of accommodation by types and category;
 - An analysis of occupancy rates throughout the year, and associated recommendations for where the Authority should be more restrictive or supportive; and
 - Overall recommendations for areas of opportunity, areas of concern, and where the SDNPA could play a more supportive role.
- 2.4 The study area is the South Downs National Park which covers over 1,600 square kilometres of lowland landscape between Beachy Head (near Eastbourne in the east) and St. Catherine’s Hill (near Winchester in the west) over the counties of East Sussex, West Sussex, and Hampshire. In terms of all UK National Parks, the South Downs National Park has the largest population (circa 118,000 people), second largest number of visitors (circa 19 million annually), and third largest area (circa 1600 km²). Its linear geography makes it more challenging to successfully manage and develop the visitor economy, when compared with most other protected landscapes.

2.5 This report has seven sections covering current UK tourism and accommodation trends, and the visitor economy in the National Park and its current performance:

- Introduction
- National, regional and local context
- Visitor Accommodation in the National Park
- Current Performance
- Conclusions
- Recommendations
- Appendices

2.6 The Asset Audit provides more details about the supply of visitor accommodation. This splits the supply into two clusters; the Tourism Economy and Sharing Economy:

- **The Tourism Economy** reflects the professional sector. It is usually run by businesses that have a website, often employ staff, usually pay VAT, and may be a member of a tourism body (e.g. Destination Management Organisation). The Tourism Economy usually includes most serviced accommodation, but it can also include significant amounts of non-serviced accommodation (e.g. professionally-run holiday cottages or camp sites).
- **The Sharing Economy** reflects the emergence of less formal operations that are usually promoted through one or more channels (such as Airbnb). The operations are often not businesses, but instead operated by property and homeowners, usually on a non-serviced basis.

2.7 While there are two broad clusters / types of accommodation, there are also two main categories of accommodation – i.e., serviced and non-serviced. This recognises the very different experience provided by a serviced offer, which in general has declined in favour of non-serviced over the last decade. Within these categories there are a range of further sub-categories offered across the UK as per Table 1 below:

Table 1 – Accommodation Categories and Typical Sub-categories

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

Tomorrow's Tourism 2024

- 2.8 As well as the Asset Audit, an optional business survey was completed by 53 accommodation businesses in May 2025. The survey contained questions on the nature of respondents' businesses and performance, and their perceived key challenges and opportunities for the visitor accommodation sector.
- 2.9 A further seven in-depth interviews were conducted with senior representatives of the visitor accommodation sector, as well as other key stakeholders to gain a more strategic understanding of the challenges and opportunities facing the sector.
- 2.10 A comprehensive accommodation audit was undertaken in 2014 and has been a helpful baseline for comparison.² In summary, the 2014 audit identified at the time:
- There was a largely leisure driven and seasonal market;
 - There were frequent shortages of all types of accommodation, both at weekends and in peak summer months;
 - There were clear prospects for future growth with good potential for the National Park to tap into the rural visitor accommodation development trends;
 - There were some clear gaps in current accommodation provision; and
 - There was strong interest from developers in visitor accommodation development.
- 2.11 The term *Visitor Economy* is used in this report to include all establishments, operators, or businesses that may run visitor accommodation, visitor attractions, restaurants, transport services, visitor services, or be suppliers to the sector.

2 Hotel Solutions , South Downs National Park Visitor Accommodation Review, December 2014

3 National, regional and local context

Visitor Economy Policy Context

Local Visitor Economy Partnerships (LVEPs)

- 3.1. VisitEngland has developed the LVEP programme to *‘transform England’s visitor economy landscape through a new structure, with the aim of better sharing priorities, resources, and targets’*. This has resulted in a portfolio of around 40 nationally supported and strategic LVEPs to provide strong leadership and governance in tourism destinations all over the country. The LVEPs will work in collaboration locally, regionally and nationally on shared priorities and targets. Their mission is to support and grow the visitor economy through robust destination management, strong stakeholder relationships, and clear planning.
- 3.2. The agreed LVEPs covering the South Downs National Park include:
 - The Hampshire, Portsmouth, and Southampton LVEP – including the area of the National Park in Hampshire and three DMOs including Visit Winchester; and
 - The East Sussex, Brighton & Hove, and West Sussex LVEP – including those areas of the National Park in East and West Sussex and 11 DMOs.
- 3.3. A strategy for growth to 2034 has been agreed for the East Sussex, Brighton & Hove, and West Sussex LVEP. The stated aim is a 50% spend increase prioritising high-value international, domestic, and business visitors, and seeing staying trips rise by 33% based on four priorities:
 - Developing high-quality infrastructure and experiences;
 - Attracting high value audiences;
 - Developing innovation and productivity in business support; and
 - Driving greater collaboration.

District Plans and Destination Management Organisations (DMOs)

- 3.4. At the more local level, there is a wide range of district councils and destination management organisations (DMOs) . These bodies are typically destination-based marketing-oriented partnerships that encourage visitation, working with and supporting both public and private sectors. In the South Downs National Park, some of these DMOs have over-lapping geographies and many have limited resources.

South Downs Partnership Management Plan (PMP) and Local Plan Review (LPR)

- 3.5. The SDNPA is responsible for the preparation of the South Downs Partnership Management Plan (PMP) and the South Downs Local Plan (currently under review). The PMP sets out the shared ambitions of many different partners and an overarching strategy for the management of the National Park over the next 5 years, while the Local Plan Review (LPR) sets out where development will take place and how planning applications will be considered over the next 15 years.
- 3.6. The PMP and LPR are both seeking to promote “Regenerative Tourism” as per the commitment of the UK National Parks – see PMP Aim 7 and LPR Policy SD23. This is focused on championing and supporting development that contributes to the enhancement and regeneration of the places and communities in which it operates; and supporting activities that help to reduce carbon emissions and increase nature recovery, while ensuring the National Parks are relevant to everyone’s needs.
- 3.7. As part of Aim 7, the draft PMP sees the visitor accommodation sector contributing to Objective 7.1 to support the growth of a greener economy while providing outstanding visitor experiences that benefit communities and the landscape. The draft also sets out targets to achieve this objective. These include supporting the LVEPs by increasing Tourism GVA within the National Park by 25% between 2024 and 2030 (Target 7.1b), improving visitor experiences so that 99% of visitors rate their enjoyment of the National Park as “high” or “very high” (Target 7.1c), and increasing income from visitors by 100% by 2031 (Target 7.1d).

UK Tourism Volume and Value

- 3.8. This section provides an overview of recent and current tourism trends in the United Kingdom and provides information on markets, performance, and trends. England's tourism sector plays a crucial role in its economy, contributing significantly to employment, regional development, and cultural exchange. Overall, it is worth £74 billion, circa 4% of GVA.
- 3.9. Inbound tourism to the UK in 2023 reached 38 million visits, 7% below pre-pandemic levels, but spending was at a record £31.1 billion, up 9% from 2019. The average spend per visit was £819, though real-terms spending has declined. Holiday visits (42% share) dropped 6% compared to 2019, while visits to friends and relatives (34% share) increased. Business tourism made up 17% of inbound visits (25% below 2019 levels, but 26% up from 2022) and generated £5.2bn in spending (17% of total inbound spend). The USA, France, and Germany remained the top markets for both

visits and spending.³ The Government’s target is to boost inbound tourism by 32% to 50 million trips by 2030, implying 4% growth per year, well above the growth of the overall economy, but just about feasible providing there is continued investment in overseas marketing. International visits represent an opportunity for the South East and the South Downs National Park.

- 3.10. In 2024, domestic overnight tourism in England declined by 10% to 90 million trips compared to 2023, but total (nominal) spending rose by 5% to £27 billion with average spend per trip increasing by 16%. The average trip length grew slightly to 2.9 nights. Visiting friends and relatives remained the primary purpose (38% share) despite a 9% drop in volume, while holiday trips fell by 13%. Business made up 6% of trips and 9% of total domestic overnight spend in 2024.⁴
- 3.11. There were 906 million tourism day visits to England in 2024, a decrease of 12% when compared to 2023. Spending rose by 6% to £48 billion with average spend per visit up 21% to £53 in nominal terms.⁵ This reflects the impact of inflation and the cost-of-living crisis.
- 3.12. In the wake of the COVID-19 pandemic, there was a significant rise in “staycations”, with more individuals opting to explore domestic destinations. This trend has persisted with visitors continuing to show interest in rural and coastal areas. Regions that offer natural beauty and outdoor activities have become particularly popular, reflecting a shift in preferences towards local experiences. This is also likely to be a helpful trend for the South Downs National Park.
- 3.13. Consumers are prioritising quality over quantity, opting for premium experiences. Spending on domestic travel is rising with the average annual spend per traveller in 2025 projected to be 12% higher than the UK average for the previous year.⁶
- 3.14. The pace of growth of the UK visitor economy is forecast to increase in real terms over the next few years. Value growth will be led by premium sectors such as holiday cottages, luxury hotels, and wellness breaks. A climate-induced staycation trend is expected over the medium-term as warmer UK weather extends peak seasons and

3 Office for National Statistics (ONS), released 17 May 2024, ONS website, article, Travel trends: 2023 – (NB Spend increase in nominal terms)

4 VisitEngland, Great Britain Tourism Survey, 2024

5 VisitEngland, Great Britain Tourism Survey: Day Visits, 2024

6 Tourism Society Journal, February 2025

extreme Mediterranean weather patterns deter more travellers from taking overseas breaks in the peak summer months.⁷

UK Consumer Trends

Experiential and 'Under-tourism' Travel

3.15. Travellers continue to seek unique experiences over traditional sightseeing. There is demand for lesser-known destinations to combat over-tourism. Hybrid holidays (e.g. rail journeys mixed with adventure travel) and film tourism are growing in popularity.

AI-Powered and Personalised Travel

3.16. Artificial Intelligence (AI) tools are increasingly being used for travel planning with demand for customised itineraries and flexible booking options on the rise. Younger travellers (25–34-year-olds) are the most engaged with AI-based recommendations.

Sustainable and Ethical Tourism

3.17. There is a growing demand for sustainable travel options, with many visitors reportedly seeking eco-friendly accommodation and experiences. 45% of travellers profess to prefer UK holidays to reduce their carbon footprint. This trend is supported by the UK government and local authorities to encourage sustainable practices within the sector, such as promoting green certification for accommodation providers and encouraging the use of public transport to reduce carbon footprints. There remains a gap between professed buying intention and actual purchasing behaviour.

Cultural and Heritage Tourism

3.18. England's rich history and cultural heritage continue to attract visitors who are interested in exploring heritage sites, museums, and cultural festivals. This trend highlights the importance of preserving historical landmarks and offering immersive experiences that educate visitors about the local culture and traditions.

Inclusion and Accessibility

3.19. The accessible travel market is worth an estimated £274 billion annually in the UK.⁸ Some 7% of UK holidaymakers prioritise finding a disabled-friendly holiday. Those seeking disabled-friendly accommodation or visitor attractions are found across all demographics, but this priority rises to 11% amongst those aged 75 and over. The older and affluent 'purple pound' will become increasingly influential as an ageing

7 Mintel, UK Domestic Tourism Market Report, 2023

8 Tourism Society Journal, February 2025

population looks for ways to continue lifelong holiday habits alongside managing a disability – especially as the travel-hungry ‘Boomer’ cohort advances into the elderly life stage. According to Mintel, there are opportunities for specialist brands offering fully serviced and supported holiday accommodation in coastal beauty spots.

- 3.20. When considering accessibility, it is important to note that only 7% of disabled people in the UK are wheelchair users – the other 93% have a wide range of accessibility requirements, including physical, sensory and cognitive impairments. It is therefore important to consider other issues of accessibility and not just wheelchair access.⁹

Accommodation and Spending Preferences

- 3.21. UK-wide, hotels remain the top choice, followed by rental properties. City breaks are the most popular type of holiday, followed by rail journeys, walking and active holidays. The short-stay rental market, including quirky glamping pods, continues to show growth.

- 3.22. Just over half of day visits to England in 2023 had a party size of 1 to 2 people, which have a higher average spend per person (£50 for solo travellers and £51 for 2 person parties per visit) than larger parties (£33 for parties of 10 or more). Spending at bars, clubs, and pubs declined by 2% in February 2025, the lowest growth in the last 12 months. Restaurants remain challenged after many months of negative trading due in part to the continued cost-of-living crisis and higher employment costs.¹⁰

Health and Wellbeing

- 3.23. UK day visits that included a wellbeing experience showed a continuous increasing trend from 2022 to 2024, and had the highest average spend (per visit per person) of all activities at £124 per visit in 2024 (vs £52 on an average day visit).¹¹

Current Issues

Economic Uncertainty

- 3.24. Global political and economic challenges have introduced significant uncertainty, impacting visitor confidence and spending habits. There is also consumer doubt about new European Union and UK electronic travel authorisation systems and new visa requirements, as well as other constraints, such as the duty-free regime in the

8 [Visit England](#), 2025

10 Barclays debit card and Barclaycard credit card transactions in the UK – year on year 12-month trend

11 VisitEngland, Great Britain Tourism Survey: Day Visits 2024 Report

UK. Fluctuations in Sterling's value and the threat of tariffs can make travel more expensive for international visitors, discouraging tourism. Rising inflation rates and the cost-of-living crisis have led to decreased disposable incomes for many travellers, resulting in a decline in both domestic and international tourism spending.

- 3.25. The increase to employer National Insurance contributions, alongside the national living wage and minimum wage increases, have hit businesses hard, such as restaurants, bars, and hotels, with a reported loss of 69,000 hospitality jobs since April 2025.¹² Many are already being forced to reduce investment, head counts, or opening hours in order to continue. Some will be looking at AI solutions to alleviate costs pressures. For example, hotels are likely to change format to apart-hotels that have fewer serviced elements.
- 3.26. Consumer confidence remains weak, but there are small signs of improvement compared to the worst periods of 2022 and early 2023. Perceptions of the wider economy have improved slightly, now at minus 19, according to the GfK consumer confidence index, offering some hope, though confidence remains fragile.¹³

Overcrowding / Visitor Pressure

- 3.27. Popular destinations can experience overcrowding / visitor pressures during peak season. Some cases of overcrowding more recently are due to social media, particularly the "aspirational influencer" trend and the sharing of travel experiences. Social media facilitates the rapid spread of information, which can influence others' travel decisions. This can lead to certain destinations becoming highly popular due to a positive social media buzz, potentially resulting in overcrowding, detracting from the overall visitor experience, and increasing pressure on local services and the environment. Impacts in National Parks can include trail erosion, litter, and inappropriate vehicle parking.

Environmental Concerns

- 3.28. The visitor economy faces growing challenges related to its environmental impact. Stakeholders must better understand these challenges in order to develop effective management strategies that mitigate negative effects on local ecosystems and communities. Shifts in climate patterns are now affecting tourism seasons in many places. While warmer temperatures may lengthen the summer season, they can also bring adverse weather, negatively impacting outdoor attractions and activities.

12 The Times 5th July 2025 reporting ONS statistics and UK Hospitality forecasts

13 IQ GfK UK Consumer Confidence Index Score: -20 in May 2025; -20 in February 2025; and -22 in January 2025

Technological Integration

- 3.29. As technology continues to evolve, tourism businesses must keep pace with digital transformation, but 90% are micro-businesses and often find investment difficult. Requirements include online booking systems, utilising data analytics for marketing, and improving contactless services. Visitors are increasingly seeking access to information about attractions and places via mobile devices, often whilst already in the destination.

4 Visitor Accommodation in the National Park

The Tourism Economy – Trends since 2014

- 4.1 This section gives an overview of visitor accommodation within the National Park’s boundary. It details various aspects of the visitor accommodation sector quantifying the extent, distribution and type. Detailed maps can be found in the Asset Audit.¹⁴
- 4.2 In general, since 2014, serviced accommodation has declined while non-serviced accommodation has increased. This is a national trend and reflected in the South Downs National Park with serviced accommodation reducing by almost two thirds from 305 properties to 112 since the 2014 audit (see Tables 2 and 3). In 2025, 36% of Tourism Economy accommodation is serviced, while 64% is non-serviced (see Table 3 overleaf).
- 4.3 There has been a significant increase in camping and caravanning which has doubled since 2014 (see Table 2), as well as an increase in Group / Hostels / Holiday Parks category, albeit from a low base for the latter, as there have been closures too, such as the YHA-run hostels at Arundel and Alfriston.¹⁵ The large drop in B&Bs and Guest Houses (-79%) reflects the national trend but note that this ‘reduction’ is more the result of a switch in category with previous B&B and Guest House owners turning to distribution channels like Airbnb which provide a greater incentive to run on a self-catering basis.

Table 2 – Change in Tourism Economy Accommodation from the 2014 Audit

Sub Category	2014	2025	Change
Hotels	31	23	-26%
B&Bs and Guest Houses	225	47	-79%
Pub / Inn	49	42	-14%
Self-catering	109	121	11%
Camping and caravanning	33	68	106%
Group/hostels/holiday park	5	12	120%
Total	452	313	-31%

¹⁴ The audit can be considered to include >90% of all accommodation in the study area

¹⁵ Group accommodation is often defined as those facilities offered to larger non-family groups with a special interest, often organised for young people.

The Tourism Economy in 2025

4.4 Table 3 shows a more detailed breakdown of the situation today. There are 313 accommodation establishments (# Est., run by 206 businesses) operating in the tourism economy in the South Downs National Park. Of these, there are approximately 1,245 rooms and 2,618 bedspaces available in the serviced part of the Tourism Economy, with a further 2,255 rooms (or pitches), and 8,292 bedspaces in the non-serviced part of the Tourism Economy.

4.5 Room numbers offered by serviced establishments exceed those of non-serviced establishments with 23 hotels (including branded budget hotels) averaging 36 rooms each, 42 inns averaging 7 rooms each, and 47 B&Bs averaging circa 3 rooms each.

Table 3 – Tourism Economy Accommodation in South Downs National Park in 2025

Category	# Est.	% Total	Sub-Category	# Est.	% of Total Est.	# Rooms Pitches	% of Total Rooms	# Beds	% of Total Beds
Serviced	112	36%	Hotel	20	6%	680	55%	1,406	13%
			B&B / Guesthouse	47	15%	130	10%	322	3%
			Branded Budget Hotel	3	1%	149	12%	308	3%
			Pub / Inn	42	13%	286	23%	582	5%
			Total	112				1,245	
Non-Serviced	201	64%	Self Catering House	121	39%	362	16%	758	7%
			Cottage / Apartment	1	0%	16	1%	32	0.3%
			Holiday Park / Lodge	11	4%	26	1%	103	1%
			Camping / Caravan / Glamping Site	68	22%	1,851	82%	7,399	68%
			Total	201				2,255	
Total	313			313		3,500		10,910	

4.6 Table 4 shows how the Tourism Economy is split between the county and district areas of the South Downs National Park. This broadly reflects land areas with 30%, 44%, and 26% of establishments in Hampshire, West Sussex, and East Sussex, respectively.

4.7 Over half of all establishments (56%) are in three district areas of the National Park. These are Chichester, East Hampshire, and Winchester, which all have significant land areas within the National Park. The district areas of the National Park in Horsham, Lewes, and Wealden account for a further 30% of establishments. While Brighton & Hove has a number of sharing economy establishments within the boundary of the

National Park, it only has one Tourism Economy business, the Chalky Downs campsite.

Table 4 - Tourism Economy Visitor Accommodation in the South Downs National Park by County and District Areas

Local Authority District	County	TE Count	TE %
East Hampshire	Hants	48	15%
Winchester	Hants	46	15%
Chichester	W. Sussex	81	26%
Horsham	W. Sussex	26	8%
Arun	W. Sussex	22	7%
Worthing	W. Sussex	4	1%
Mid Sussex	W. Sussex	3	1%
Adur	W. Sussex	2	1%
Lewes	E. Sussex	35	11%
Wealden	E. Sussex	34	11%
Eastbourne	E. Sussex	11	4%
Brighton & Hove	Unitary	1	0%
		313	

- 4.8 The split of properties across the two Local Visitor Economy Partnerships is 70% in the East Sussex, Brighton & Hove, and West Sussex LVEP Area, and 30% in the Hampshire, Portsmouth & Southampton LVEP Area.

Serviced Accommodation

- 4.9 The largest hotel in the National Park is Voco (131 rooms) near Winchester. It traded under the Holiday Inn brand until 2024 and has recently benefited from a £2.5m refurbishment. There are a number of 'country house' style establishments such as Champneys Forest Mere, The Pig in the South Downs, and the Goodwood Hotel, part of the estate on the boundary of the Park. Other hotels, often in historic buildings and within settlements, are perhaps more typical of the serviced offer. These include the Nest in Petersfield, the Star in Alfriston, and the Spread Eagle Hotel in Midhurst (see Image 2 below).

Image 2 – Entrance to the 35 Room Spread Eagle Hotel, Midhurst



Branded Budget Hotels

4.10 There are just three branded budget hotels in the study area; two Premier Inns in Petersfield and Arundel, and a further Comfort Inn in Arundel (which is just outside the National Park boundary but is included as it was featured in the 2014 audit). There will be relatively few sites where such hotels may be commercially viable, but they invariably offer a consistent standard of service at a lower price point and bring local employment advantages.

Image 3 – Entrance to Premier Inn’s 47 Room Hotel, Petersfield



- 4.11 There are only seven hotels in the key market towns of Lewes (1), Midhurst (3), Petersfield (2), and Petworth (1).

B&B & Guesthouses

- 4.12 The B&B offer is distributed throughout the National Park offering 10% of all serviced rooms with prices ranging from £100 per night in low season to £160 per night in high season.¹⁶ The average number of rooms offered is three per establishment, but there are outliers that offer more than ten rooms such as Langrish House B&B near Petersfield. There are also many more modest properties offering a warm welcome and great value such as Sunnyside Cottages in Rodmell, Lewes. Quality is very good for those who have a web presence, all being placed in the top quartile.

Pubs & Inns

- 4.13 There are 42 pubs/inns across the National Park, a decrease of seven establishments (14%) from the 2014 audit. Of these seven, two have closed, two are now pubs with no accommodation, one has diversified to offer self-catering units alongside its inn accommodation, one has been turned into boutique apartments and commercial units, and one was outside the National Park boundary. One pub, the Blue Bell Inn in Cocking is community-owned offering three rooms and a very high-quality offer.

Image 4 – The Five Room Selsey Arms near West Dean, Chichester



16 For the purposes of the audit, high season is defined as August while low season is defined as November.

Non-Serviced Accommodation

Self-Catering

- 4.14 Self-catering has remained broadly similar in importance over the last 5 years for those operating in the Tourism Economy. A stock of 109 self-catering properties has increased to 121, operated by 45 businesses. Many businesses will typically have four or five units. There are a range of very high-quality operations such as Burrow Hill Barns near Ramsdean and Wallops Wood near Droxford, with a capacity for 110 guests in 12 properties and a VisitEngland Excellence for England winner. Both are Premier Cottage members. These businesses will be creating year-round employment and supporting the local supply chain.
- 4.15 The majority of the sharing economy offer will also be self-catering properties that include a wide range of formats and facilities. They are differentiated in this report by the distribution channel used and because they are not normally run as businesses.

Camping & Caravanning

- 4.16 The number of camping and caravanning sites has seen significant growth since 2014, and now equates to 68% of the National Park's Tourism Economy accommodation capacity. Sites are relatively small compared to many other parts of the UK, providing an average of 25 pitches per site. They vary from high-end glamping to more traditional sites shielded in wooded areas suitable for a mix of mobile homes, caravans and camping. A map provided in the Asset Audit shows a small number of large sites particularly in the central and western parts of the National Park with less provision in East Sussex.

Image 5 – The Central Facilities at Graffham's Caravan & Camping Club Site



Group & Youth Accommodation

4.17 There are a small number of other properties in the non-serviced category, either holiday parks or centres for youth and group markets. The Marwell Holiday Park for example has lodge, safari tent, caravan and camping accommodation with a café, restaurants, retail, and a whole range of activities on site. It was recently acquired, and is now managed by Landal, a leading company in the sector. A further 11 establishments offer group accommodation. Four of these 11 include two YHAs near Lewes and Alfriston, the Sustainability Centre (between Clanfield and East Meon), and South Downs Bunkhouse (Houghton).

The Sharing Economy

4.18 The Sharing Economy refers to short-term let units listed on Airbnb and Vrbo, as reported by AirDNA. Out of a total of 4,680 units registered on Airbnb and Vrbo, there are 1,903 active units within the National Park, listed by 1,157 unique hosts.¹⁷ These active units comprise 3,703 total rooms, sleeping up to 8,147 guests. Total annual income from Sharing Economy units across the South Downs National Park over the last twelve months was just over £40 million at an average of £21,117 per trading unit.

Image 6 – Lombard Street Airbnb, Petworth



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

- 4.19 Most Shared Economy accommodation is entire homes/apartments (84%) with an average of 1.9 rooms. Over 60% of hosts have more than one unit available for rent, reflecting the scale of the significant sector and source of income. A total of 1,035 properties or 54%, are classed as either luxury or upscale, while 485 properties (26%) are defined as budget or economy. The balance of 365 properties (19%) are defined as ‘Midscale’.¹⁸ Some 209 properties (11%) employ the services of a property manager to help them market and manage the accommodation. The three most prominent companies in this role include Cottages.com., Henry Adams Holiday Lets and Sykes Holiday Cottages.
- 4.20 As can be expected, there are higher densities of Shared Economy accommodation around the more populated areas of Lewes, Midhurst, Petersfield, and Petworth. Alfriston, Ditchling, East Dean, Findon, and the areas close to Chichester also have higher densities of Sharing Economy accommodation – please see the map on page 11 of the Asset Audit.
- 4.21 Table 5 below gives the key performance metrics with two comparators, the nearby Borough of Eastbourne and the Peak District National Park.¹⁹

Table 5 – Key Sharing Economy Metrics

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

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

18 18 of the active units are not defined which is why the overall figure does not add up to 1,903.

19 The data for Eastbourne relates to Eastbourne Borough’s Planning Authority Area – i.e., the area of the borough outside of the South Downs National Park.

5 Current Performance

- 5.1 This section summarises the current performance of accommodation in the Tourism Economy, first in general terms and then with a more specific overview of local performance. It was informed by a business survey of accommodation providers undertaken as part of this project in May 2025. The survey yielded 53 responses, some 17% of total local Tourism Economy accommodation. It provides an indicative view on many key metrics.

UK Accommodation Performance Trends

Hotels

- 5.2 *Market Dynamics* – In 2024, the hotel sector saw a static situation with regard to domestic stays with 50% of UK adults staying in a hotel, down from 55% in 2022. This is partly due to increased confidence in international travel and the higher cost of living. The competition from short-term rental properties has intensified with 19% of UK adults opting for rental accommodation (1.5 times higher than pre-pandemic levels).
- 5.3 *Booking Trends and Customer Preferences* – Almost two thirds of hotel bookings were made online. The cost-of-living crisis is prompting consumers to be cautious with spending. Consequently, 28% of UK adults do not plan to stay in a hotel in the year to September 2025, albeit up from 24% two years earlier. This shift has particularly impacted demand for short breaks.
- 5.4 Despite a decline in future participation, interest in budget and luxury hotel stays has remained strong. Data suggests that more consumers favour cheaper options, while the more affluent clientele in the luxury segment is likely helping to sustain demand for high-end choices. This stability in both budget and luxury segments puts pressure on the mid-market hotels, which are caught between these two extremes.²⁰
- 5.5 *Leading Brands* – Premier Inn and Travelodge, the largest hotel operators in the UK, are expanding aggressively. Premier Inn aims to increase its rooms from 85,920 to 98,000 by 2030 and Travelodge plans to open hotels in approximately 300 new locations (opening 15-20 hotels per year when real estate market conditions improve). In response to inflationary pressures, luxury hotel chains are launching more affordable brands. For instance, Marriott's Four Points Express by Sheraton and Hilton's Spark are new midscale and premium economy options.

²⁰ Source Mintel (2024) Hotels – UK – 2024

5.6 Premier Inn and Travelodge have a similar share of individual users compared to before the pandemic, while Airbnb expanded its customer pool significantly to become the second most used brand (ahead of Travelodge) over the past year. 19% of UK adults used the brand in the year to November 2023, up from 12% in the year to November 2019. Brands launched for long-stay guests include Hilton's new extended-stay brand under the working title Project H3, an apartment-style accommodation for those typically staying 20 nights or more. Elsewhere, Hyatt Hotels Corporation launched extended-stay brand Hyatt Studios.

Outlook

5.7 Opportunities include:

- **Older Demographics** – The ageing population offers some hotels a market opportunity but this may need investment in accessible features to make a stay more convenient for older visitors.
- **Apartment-style hotels** – 74% of UK hotel guests are interested in staying in an aparthotel, with 25-to-44-year-olds, families, and affluent travellers particularly interested. Brands both in and outside the travel industry are responding to the strong demand. For example, Vertus Edit, part of the residential rental arm of Canary Wharf Group, is set to open its first aparthotel.
- **All-inclusive deals** – 74% of hotel guests show interest in all-inclusive deals from hotels, rising to 83% of parents of under-18s. Offering good hotel restaurant quality is important when promoting all-inclusive offers. 34% of those interested in all-inclusive stays prioritise this when choosing a hotel compared to 22% of those who are not.
- **Glamping experiences** – Interest in glamping at a hotel's site is strong (53%), particularly among younger and more affluent guests. A recent partnership in this area is Hilton teaming up with AutoCamp to offer accommodation in Airstream suites and luxury tents in natural environments. This represents an important opportunity for the South Downs National Park.

Holiday Rental Properties ²¹

5.8 *Market Growth and Trends* – Holiday rental properties have shown the highest resilience and growth potential among accommodation types. The COVID-19 pandemic accelerated the trend towards self-catering rentals, favoured for their affordability and personal space. In 2023, domestic holiday rental stays increased by

21 Source Mintel (2023) Holiday Rental Property – UK – 2023

1.1%, with spending growing by 3.2% to £3.3 billion. The segment's growth, though slightly slower than the previous year, is expected to continue.

- 5.9 The pandemic significantly boosted the use of holiday rental properties, with 29% of UK adults having stayed in such accommodations in the three years to April 2023, an increase from 25% in April 2017. Airbnb has introduced a new 'Rooms' category to address cost-of-living concerns. This category features affordable room options, enhancing its appeal to budget-conscious travellers. Airbnb's focus on detailed host profiles and privacy features aims to build trust and attract a broader customer base.

Outlook

- 5.10 The domestic holiday rental property market remains buoyant and is expected to grow further to 9.1 million stays by 2028, with associated spending reaching approximately £3.6 billion.
- 5.11 Upcoming regulatory changes that were foreseen by the previous government are still to be confirmed.²² These include the introduction of a registration scheme addressing some consumers' concerns about staying in holiday rental properties, and should also help to protect communities.²³ However, these changes could also affect the willingness or ability of hosts to rent out their property.

Camping and Caravanning ²⁴

- 5.12 Consumer trends in the camping and caravanning markets in the UK highlight a preference for affordable and unique experiences with younger generations and families leading the demand. Wellness holidays, nature-based experiences, and premium options like glamping are gaining traction, despite challenges to growth. There is also a growing interest in off-peak camping, with an emphasis on social interaction and eco-friendly accommodation.
- 5.13 The UK camping and caravanning sector faced a decline in value in 2024 due to weather and economic pressures, though interest remains high, especially among younger generations and families.

²² The new regulations may include a new planning class for short-term rentals with a full-time holiday let likely to be reclassified as use class C5, a policy that will see holiday let properties require planning permission from the local authority, as well as the introduction of a national register for short-term lets, and the abolition of the furnished holiday lettings regime (tax relief for owners of FHLs) from April 2025.

²³ <https://www.gov.uk/government/news/short-term-lets-rules-to-protect-communities-and-keep-homes-available>

²⁴ Sources: Mintel UK Camping and Caravanning Market Report 2025; Statista 2025

5.14 It is projected that the UK camping market will generate a revenue of £718m in 2025 and is estimated to grow annually at a rate of 3.64% resulting in a projected market volume of £811.32m by 2029, with 6.53 million users. The expected average revenue per user (ARPU) for the camping market is £127.27.

Outlook

5.15 The outlook for the camping market is positive and this can support accommodation in the South Downs National Park:

- Customers in the UK are increasingly seeking outdoor experiences and activities, driving demand for camping equipment and accessories.
- The trend towards sustainable and eco-friendly products has also influenced consumer preferences in the camping market, with a growing interest in environmentally conscious camping gear.
- The UK's camping market has seen a rise in demand for glamping accommodations, reflecting a growing interest in luxury outdoor experiences.

Annual Occupancy and Average Daily Rate in the South Downs National Park

5.16 A survey of accommodation providers operating in the Tourism Economy was undertaken to inform this Review. This yielded a self-selecting sample of 53 providers who, further to contact by the South Downs National Park, opted to complete the survey. The results are given below and should be considered as indicative given the range of different businesses that took part and a sample size that represents just 17% of all the Tourism Economy properties operating in the National Park.

5.17 The overall average occupancy in the National Park was just short of 59% for both serviced and non-serviced accommodation.²⁵ In 2024, the average room occupancy in the wider South East England was 64% for serviced accommodation.²⁶ Although lower than national and regional trends, the occupancy rate for Tourism Economy accommodation in the National Park has improved from 53.5% in 2022, to 55.2% in 2023, and to 58.7% in 2024. The occupancy rate is short of the England average when considering serviced accommodation performance. The non-serviced accommodation will generally trade at lower occupancy rates and so reduce the overall average given above. Figure 1 (overleaf) shows a wide range of different occupancy rates reported. Those with a lower occupancy indicates that the

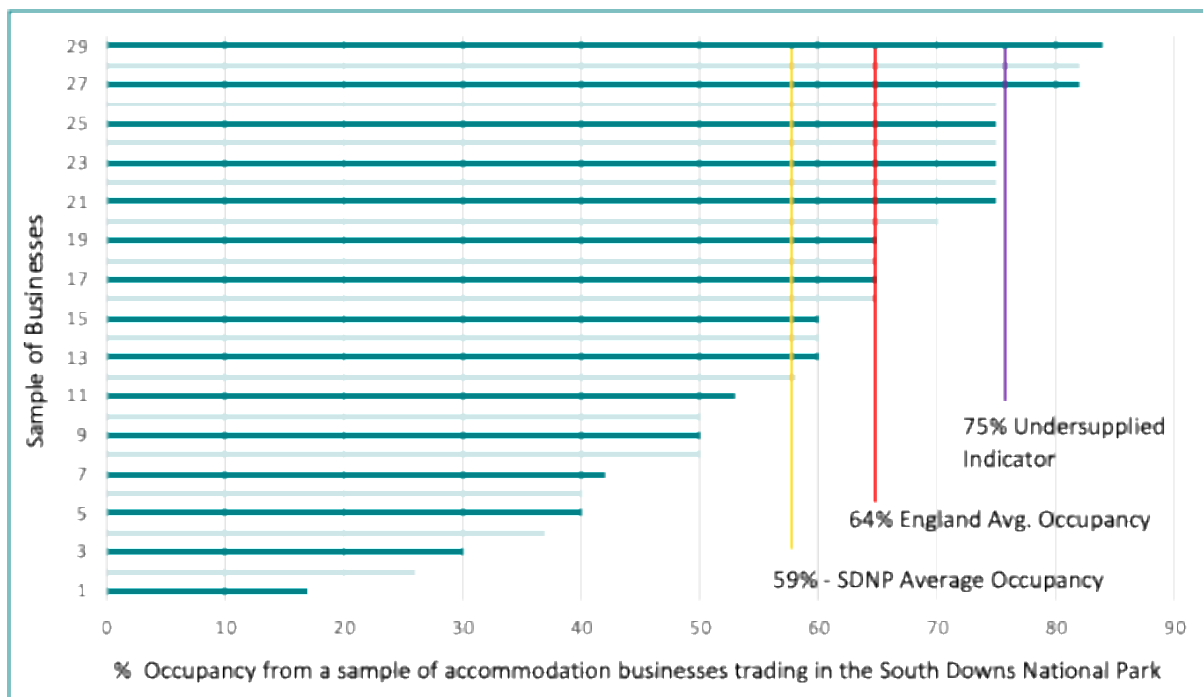
25 Tomorrow's Tourism 2025 – Survey of Accommodation Providers 53 responses / Q 25 n= 31

26 VisitEngland 2025 England Occupancy Survey, January 2025

accommodation may be just one element of a wider business that could include, for example, farming or other land-based activity. Those with higher occupancy indicates a greater focus on accommodation provision as a sole business aim.

5.18 In 2024, the Average Day Rate (ADR) for serviced properties in South East England was £89. In the same year, the ADR in the National Park was £106 (and again this is reflecting a wider range of accommodation, not just serviced accommodation). The higher ADR reflects a destination that can typically command higher prices due to its location, the nature of the offer, and the proximity to the South East / London market. The ADR in the National Park reported range is skewed higher than average with 40% of the sample trading at a rate of over £120 per room per night, while only 20% have an ADR of less than £70.

Figure 1- Occupancy in 2024 across the random sample of South Downs accommodation businesses



5.19 With reference to Figure 1 above, commercial hotel developers will normally invest in new-build hotels where there is an indication of undersupply. This is typically when year-round occupancy rates approach 75% or above. Southampton, for example, regularly sees 75%, as does Gloucester and Plymouth. This level of demand can make investment viable although there are other hurdles including funding, construction costs, and planning. The latter is often lengthy, expensive and may have unclear outcomes.²⁷

27 Colliers (2023) Enabling hotel development for enhancing destinations TMI Hot Topic Event Marc Finney Hotels & Resorts Consulting

- 5.20 The majority of providers in the business survey sample (70%) are micro-businesses employing between 0 and 4 people full time (although this is lower than the national average and indicates that the sample has attracted a disproportionate number of larger businesses) with 11% of the sample employing between 5 and 9 people and 7% between 10 and 49 people. Those employed on a part-time basis were even more likely to be employed by a business of between 0 and 4 people.
- 5.21 Some 35% of the sample had additional businesses supporting the accommodation, including other elements of the visitor economy. Respondents reported a range of linked assets including a café, restaurant, tea-room, wedding venue, as well as other enterprises, including a livery, bakery school, timber crafts, an estate tour and a vineyard. That over a third of the sample have additional income sources shows the inter-woven nature of many accommodation businesses, supporting a range of enterprises that are rooted in the local environment.

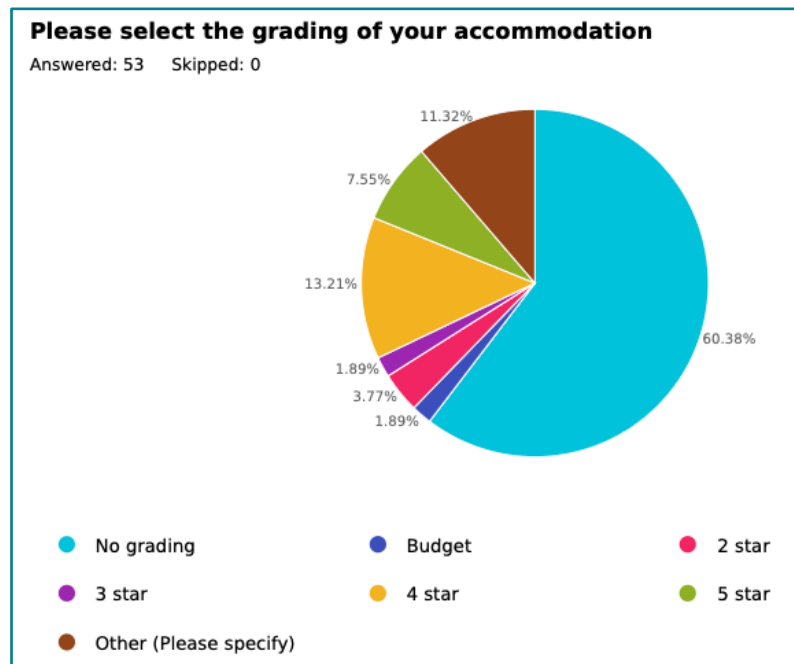
Booking Channels

- 5.22 The majority of respondents reported that the primary booking channel was their own website. Of the major online booking channels, half reported using Airbnb and 45% reported using Booking.com. The relatively low use of channels like Expedia (10%) and Hotels.com (9%) is likely to reflect the lack of a serviced offer. 75% of those who responded to the survey question also have phone or email booking available. Other channels used include Sykes Cottages, Cottages.com and Premier Cottages, which indicates a higher end offer.
- 5.23 Online Travel Agencies (OTAs) have significantly transformed the visitor accommodation sector by reshaping the way travellers book their stays and how properties manage their bookings. OTAs play an important role in matching evolving consumer demand with available supply. They have expanded the reach of tourism businesses by allowing small and medium-sized enterprises to showcase their offerings to a global audience. The issue for many businesses, however, is the perceived high commission rates charged.

Grading, Quality and Awards

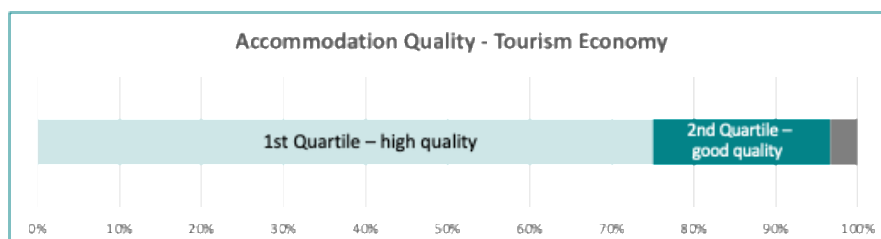
5.24 Respondents to the business survey were asked to confirm the grading of their accommodation, either offered by the AA or VisitEngland, offered by other organisations, or self-assessed on the basis of industry norms. Results are shown in Figure 2 below.²⁸

Figure 2 – Grading of Accommodation



5.25 Drawing on online reviews from May 2025, accommodation quality is assessed by taking reviews from a sample of 88 Tourism Economy accommodation establishments on TripAdvisor and giving each a percentage score based on the number of 'excellent' and 'very good' ratings combined as a proportion of total ratings. These are then sorted into Quartiles as per the chart in Figure 3 below.

Figure 3 – Quality of Accommodation – Online Rating



²⁸ June 2025 – Survey of Accommodation Providers n=53

- 5.26 The quality score for Tourism Economy accommodation in the South Downs National Park is generally good, with 75% of all establishments being in the first quartile (“high-quality”) and 22% being in the second quartile (“good quality”). Just 3% of establishments fall into the third quartile and there are none in the fourth quartile. Third quartile businesses will typically have issues to resolve while fourth quartile businesses will be of very poor quality.
- 5.27 The percentage in the first quartile is, however, lower than similar accommodation in, for example, Essex where 86% of properties were placed in the first quartile.
- 5.28 Seven respondents (13% of the sample) responded positively to the question about sustainability. Of these, six held the Green South Downs Tourism Award, and one was a certified B Corp. The wider asset audit also captured just one each of the following awards: AA Breakfast Award, VisitEngland Silver Award, Green Tourism Silver Award, and VisitEngland Pets Welcome. Among the Airbnb properties, 22% have ‘Superhost’ status, a badge the platform automatically awards to top-performing Hosts.²⁹
- 5.29 Four businesses (8%) in the survey reported an accessibility certification with two of these reporting a connection to VisitEngland’s National Accessibility Scheme and two having received an Access Audit or other specialist advice.
- 5.30 In 2015, a report by VisitBritain³⁰ estimated that 30% of establishments in the UK were accessible (‘accessible’ was defined as having a step-free access and at least one room for wheelchair users). So the current performance of the businesses in the survey sample could be seen as somewhat lower, although caution is needed in inferring that those businesses who are not certified are less accessible. The VisitBritain report also found that nearly two thirds (63%) of businesses which provide for accessibility needs did not promote that fact. In 2018, VisitBritain found that 19% of the population had a health impairment, with the most common being long-term illness. Long domestic holidays (4+ nights) were the most common type of trip for those with a health impairment.

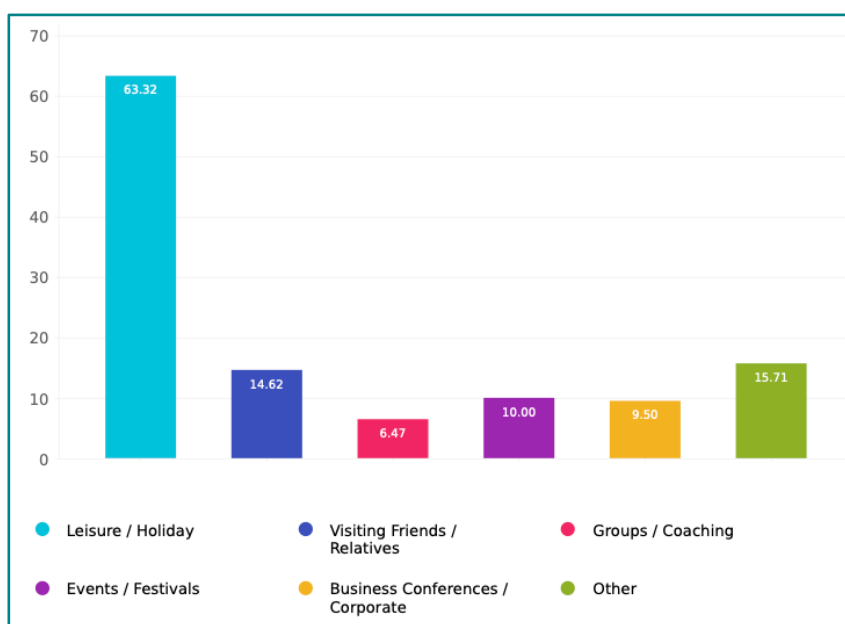
Core Markets

- 5.31 Two thirds of visitors staying in accommodation are on holiday / at leisure, with a further 15% using paid accommodation to be able to visit friends and relatives. Figure 4 shows that businesses also estimate that a further 10% are attending events and festivals, with a similar number estimated to be travelling on business.

²⁹ Details of Airbnb’s Superhost requirements can be found [here](#)

³⁰ National Survey on Accessibility Provision (2015)

Figure 4 – Purpose of Visit to South Downs National Park



Churn and Development

5.32 Over the last five years, six owners (13% of those responding) reported that ownership of the accommodation had changed hands which, if scaled up to reflect the entire Tourism Economy in the National Park, indicates that 41 businesses could have changed hands, which is an average of eight a year. There was no change to the number of rooms in 74% of properties, but 22% increased the number of rooms while 4% decreased the number of rooms. This implies that around 16 businesses across the National Park could seek to make such changes each year, most of these are likely to be enlargements. In general, however these are likely to be small upgrades with an average addition of six rooms. Planning permission was sought by one third of respondents - of these, two thirds were successful and one third was unsuccessful.

5.33 Capital investment was made by three quarters of businesses responding to the survey. These typically included refurbishments, upgrades, and adding new formats such as glamping accommodation or shepherd’s huts, ensuite facilities, heat pumps, rainwater harvesting systems, bike storage, hot tubs, and hard standing for pitches. The cost of this work varied with an indicative average of £360,000 equating to annual investment into the Tourism Economy in the National Park of some £15 million per year. This will also be of benefit to many small suppliers.

5.34 The investment forecast from the sample is not as healthy, with 28% of businesses likely to invest in the future, while 35% are unlikely to invest and 37% are undecided.

Supply & Demand

5.35 Table 6 below shows the number of bedspaces occupied based on an occupancy rate of 58.7% for Tourism Economy accommodation and 52% for Sharing Economy accommodation in the National Park. The total supply is circa 6.2 million bednights per year with the Tourism Economy offering 57% of total bedspaces. Theoretical occupancy is based on a total of 325 days per year operation, taking account of refurbishments and unforeseen closures.

5.36 Current demand is estimated on the basis of 2019 GBTS figures for National Parks, as shown in Appendix II, as this is currently the most accurate way of assessing demand. Demand in 2019 is likely to be similar to current visitor numbers. An estimate of 100,000 international visitors is added to the domestic demand of 2,948,000 giving a total of over 3 million bedspaces per year.

Table 6 – Total Accommodation Supply against Demand

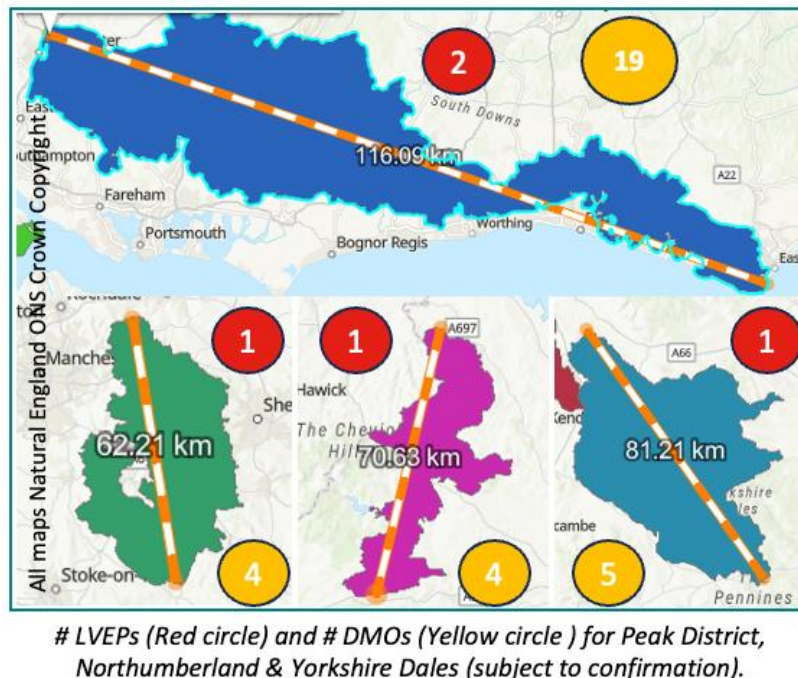
Sub Category	Est.	Total Bedspaces	Average Occupancy % 2024	Utilised Bedspaces 2024 ¹	Total Annual Supply ²	Demand (2019) ³
Hotels	23	1,714	58.7%	326,988	557,050	
B&Bs and Guest Houses	47	322	58.7%	61,430	104,650	
Pub / Inn	42	582	58.7%	111,031	189,150	
Self-catering	121	758	58.7%	144,607	246,350	
Camping, caravanning & glamping	68	7,399	58.7%	1,411,544	2,404,675	
Group/hostels/holiday park	12	135	58.7%	25,755	43,875	
Tourism Economy Total	313	10,910	58.7%	2,081,355	3,545,750	
Sharing Economy Total	1,903	8,147	52.0%	1,376,843	2,647,775	
Grand Total	2,216	19,057	57.9%	3,458,198	6,193,525	3,048,000
¹ Utilised Bedspaces 2024 = Total Bedspaces x Average Occupancy x 325 days - to allow for refurbishments ² Total Annual Supply = the total number of bed-spaces over 325 days. Assumes 2 people per room and 100% occupancy. ³ Demand (2019) reports demand using the GBTS survey Total # Nights in SDNP (Domestic / International Holidays and Business). See Appendix II for more details of the calculation.						

6 Conclusions

Key Challenges

- 6.1 **Visitor pressure at key sites** – There is a current challenge regarding the numbers and management of visitors to various popular honeypot sites across the South Downs National Park.³¹ This particularly concerns day visitors to around 40 key sites and is more pronounced in the eastern area (56% of sites), with the central and western areas containing a further 27% and 17% of sites which experience high footfall, respectively. Management plans, for example, that seek to reduce the impact of visitors or increase the durability of resources are strategies already employed to varying degrees by land managers.³² Contemporary and time-series data on footfall counts, mobile phone traffic, and other sources are likely to assist in the design of solutions for these important places. See Section 3 of the Asset Audit for a map of the key sites, along with the visitor attractions around them.
- 6.2 **A highly fragmented sector** – The governance of the visitor economy will be more difficult than in other UK National Parks due to geography. As Figure 5 shows, the South Downs National Park is longer than other UK National Parks, and there is not yet a fully mature system of tourism governance.

Figure 5– Difference in scale, LVEPs and DMOs across selected National Parks



31 'Honeypot' – Something which attracts people in great numbers (Collins Online Dictionary)

32 Rober Manning (2017) Managing Outdoor Recreation - Case Studies in the National Parks 2nd Ed. CABI

- 6.3 Appendix III shows the wide range of DMOs that will have varied and differing interests in the National Park and usually have an over-riding promotional purpose. The situation is particularly congested in Sussex. Establishing guidelines outlining the individual contributions of each DMO—and how they can best support the National Park’s special qualities, appropriate positioning, and promotional messaging—along with agreements to avoid promoting key hotspots in favour of lesser-visited areas, could provide a constructive path forward.
- 6.4 **A Disparate Business Network** – Such fragmentation also has implications for supporting business growth as they will be subject to lots of voices and demands. Given the geography, the different sectoral interests (camping, self-catering etc) are likely to be well spread out. This is also happening in the context of a relatively new National Park which has – as its main role – significant planning responsibilities. Robust initiatives to involve businesses, such as in the Green South Downs or the Visitor Giving scheme, have perhaps not created the cut-through initially expected.
- 6.5 The business base of the Tourism Economy is currently estimated to be made up of a professional element (circa 40%), a lifestyle segment made up of early retirees or other incomers (circa 30%), and those who have lived and worked in the National Park for years and are using tourism as an economic supplement to other enterprises such as farming (circa 30%). These different motivations also have implications for how these businesses are advised, connected, networked, and supported.
- 6.6 The SDNPA operates in a completely different world to many of these small businesses, and it is a world that is often alien to them. There may be benefit in rethinking how business advice is given. For example, the current 28-page Technical Advice Note on camping and glamping is very thorough, but for the audience it might be better summarised, simplified and presented in a more accessible way. Rather than splitting advice down into sectors, an approach may be to provide a guide for the whole Tourism Economy, as the National Forest have done.³³
- 6.7 As the local planning authority, it is not always appropriate or possible for the SDNPA to provide the support to the Tourism Economy that is needed. New approaches to ensure that the network can be supported should be considered - with these contracted and delivered on behalf of SDNPA - or aligned to its aims. Consideration should be given to the delivery of a range of services under contract by LVEPs or DMOs and other partnerships or agencies. There is a large question about the effectiveness of current marketing activity and how it is assisting the National Park.

33 National Forest (2021) [A National Forest design guide – Sustainable tourism accommodation](#)

Key Opportunities & Options

Market Assessment

- 6.8 There is an excellent opportunity to tap into the growing market reported earlier where the National Park is well placed to benefit. Visitors are increasingly seeking rural destinations which can provide ‘slow tourism’, relaxation, wellness, personal growth, isolation, back to nature, heritage, peace and quiet, along with activities and pursuits in the countryside. The potential is possibly greater for the South Downs (compared to other National Parks) due to the unparalleled catchment, ease of access, and the relative ‘newness’ of the destination. The SDNPA’s wider goals around sustainability, biodiversity, and climate will increasingly resonate with consumers who are becoming more concerned about environmental degradation. More impactful phenomena, notably climate change, will also create the opportunity for more leisure and tourism demand over the longer term, as many of the vineyards in the National Park will currently attest to.

Accommodation Development Options

- 6.9 The work undertaken has confirmed that accommodation supply currently exceeds visitor demand, which is a change to the findings of the 2014 report. This has been facilitated by the growth of the Sharing Economy via Airbnb and related channels. This has seen a rise from a marginal number of listings in 2014 to 1,903 trading properties offering 3,703 rooms across the National Park in 2025. There is no immediate need that cannot be met by existing accommodation. Indeed, it is likely to be more important to raise occupancy for the existing accommodation base and support these businesses to improve their performance and also contribute to the special qualities of the National Park. In conclusion, the evidence of this Review indicates there is no immediate need to increase visitor accommodation provision.
- 6.10 Based on expressed investment intentions in the sample, existing accommodation may be likely to generate up to 30 planning applications per year across the National Park, which may incrementally add between 120 to 150 rooms per year (although this will need to be monitored). As far as accommodation sub-categories go, it would be helpful to outline a generally positive approach for refurbishment and increases in room numbers where appropriate. In the light of current over-supply, Table 7 below gives a possible approach for further consultation.

6.11 The advantage of the Tourism Economy is that it can provide accommodation in properties that have strong historic, cultural, and landscape connections rooted to the place in which they are situated. This close connection between tourism operations and the special qualities of the National Park is why it is also an important solution to many of the National Park’s wider challenges.

Table 7 – Possible Approaches to Visitor Accommodation Development

Sub Category	Approach
Hotels	Support existing stock with additional rooms. Refurbish existing stock (e.g. Angel Inn). New build on brownfield sites within settlements.
Budget Hotels	Likely to be very limited site opportunities outside of major transport routes and viability in other places is unlikely to support operators' business models.
B&Bs and Guest Houses	Support existing stock with refurbishments / additional rooms and support new business developments.
Pub / Inn	Encourage existing stock to convert existing rooms and support overall viability of rural pub operations.
Self-catering	Encourage reuse of existing (especially older) buildings and support demolish and new build options for new accommodation where appropriate.
Camping and caravanning	Encourage both value and higher end offer including glamping.
Group/hostels/holiday park	Encourage hostel and bunkhouse accommodation, possibly via joint ventures to establish a network similar to the existing facility at Houghton.
Sharing Economy	Approach will be subject to wider government plans on a statutory registration scheme and use-class C5. Consider support via a new network in the interim period.
Viticulture	Only four vineyards currently offer accommodation. This represents a major opportunity for the National Park and should focus on the conversion of existing buildings.
South Downs Way	Consider a Visitor Experience Development Programme for Tourism and Sharing economy businesses operating within 2 miles of the South Downs Way.

Accommodation Clusters

6.12 The project brief sought to identify clusters of visitor accommodation and understand where there may be an over or under supply of visitor accommodation. Appendix IV shows the clusters, Appendix V splits the clusters into serviced and non-serviced accommodation, and Appendix VI shows the distribution of the Sharing Economy. The combination of the Tourism Economy and the Sharing Economy means that, even outside of the main clusters, there are places to stay nearby.

- 6.13 Wine tourism is becoming more popular and remains an opportunity for the South Downs National Park given that 25% of all vineyards in the UK are in Sussex.³⁴ This viticulture industry is growing and can be supported by related accommodation, both on the vineyard estates themselves and through symbiotic relationships with nearby accommodation providers. Currently only four vineyards offer accommodation and there is significant growth potential, both in terms of new supply and new demand. See Appendix VII for the related map. Margaret River in Australia and Napa Valley / Sonoma in USA are good examples of how the visitor economy can work successfully with the viticulture sector.
- 6.14 The South Downs Way offers the opportunity to encourage accommodation providers along the route to engage in joint development and marketing, supported by Natural England and local authorities. The listing currently used to showcase accommodation is somewhat out of date. A product development programme could help operators near the path to align their businesses to the special qualities of the National Park and become ambassadors for the place. One model used in the Wild Atlantic Way in Ireland saw a comprehensive programme of Visitor Experience Development Planning with many businesses along the route.³⁵ The Dark Skies designation may also offer further niche potential.

Image 7 - South Downs Way signage on the B2141



34 Sussex Wine Tourism. The [Prospectus](#) for growth was published in June 2023 and sets out the steps to develop the county's wine tourism offer and secure Sussex's place as the UK's leading wine destination.

35 See Failte Ireland (2022) [Wild Atlantic Way Regional Tourism Development Strategy 2023 – 2027](#)

6.15 It would be beneficial to find ways where further investment can be made into the visitor economy, as a step-change will be needed to put in place the regenerative tourism ambitions set out in the draft PMP. Tourism is currently last on the list in the draft PMP but it can fulfil an important role, as investment in the sector can also help deliver other elements of the SDNPA's mission. While the visitor economy can drive income, wealth, development, learning, skills, and new businesses, it can also contribute to many of the other PMP priorities such as Arts and Heritage, Outdoor Learning for Young People, National Park for all, Sustainable Transport and Increased Volunteering.

7 Recommendations

- 7.1 The level of investment needed to deliver a truly regenerative visitor economy will require additional resources. Given current budget constraints within the National Park Authority, it will be important to secure other public funding and partnership activity to deliver many of these recommendations. In our view, major benefits will arise in having a more strategic approach to the development of the visitor economy and making it more of a priority.
- 7.2 Potential recommendations are given under four headings:
- Strategic Approach & Governance;
 - Visitor Management;
 - Business Network Development; and
 - Accommodation Supply.

Strategic Approach & Governance

1. Agree on high level targets as part of the PMP process. These could include:
 - Converting day to stay;
 - Increasing length of stay;
 - Raising accommodation occupancy;
 - Increasing the number of businesses in 'Our South Downs' network; and
 - Increasing visitor giving.
2. Further define the National Park's role and how it might develop over the six-year period of the next PMP, who the key partners are, the priorities, funding requirements, likely suppliers, delivery arrangements etc.
3. Agree with both LVEPs the core partnership objectives and targets, mutual expectations, working arrangements, National Park positioning and messaging. Consider the development of the SDNP's brand position, profile and promotional activities, with a core objective to raise accommodation occupancy from current levels.
4. Given imminent local government reorganisation, consider and draw up agreements with districts / new unitary authorities to define messaging, marketing objectives and other matters of mutual interest.
5. Strengthen communications around the connection between landscape, nature, and individual wellbeing, highlighting how businesses and visitors can benefit from engaging with the natural surroundings and special qualities of the National Park.

6. Consider broadening the aims of the South Downs National Park Trust to include the conversion of heritage buildings for visitor accommodation use; improvements to walking and cycling provision; and encouraging visitor volunteering. (The latter may need a new approach or partnership with a CIC vehicle or similar).
7. Engage with the prospective Hampshire and Sussex Mayors to advocate for enhanced accessibility and public transport infrastructure, ensuring visitors can easily reach key attractions. This includes discussing potential service improvements and accessibility measures.

Visitor Management

8. Revise and invest in the South Downs Trust Visitor Giving scheme, setting annual targets for business participation.
9. Collaborate with partners to accurately identify and track visitor numbers, associated metrics, and management challenges at popular sites such as, but not limited to, Seven Sisters Country Park.
10. Facilitate partnerships with transport providers to promote sustainable travel options within the National Park. Work closely with transport and highways teams to ensure a coordinated approach to improving access.
11. Explore the implementation of "local traffic only" advisory signage on unclassified county roads and arrangements for byways open to all traffic, to alleviate congestion or damage caused by visitor traffic.
12. Promote collaboration among public transport operators, including the Cuckmere Community Bus and train companies, to develop joint ticketing initiatives and marketing strategies for public transport options.
13. Identify and promote public transport hubs that provide easy access to walking routes in the National Park, encouraging visitors to use sustainable travel methods.
14. Review the promoted PROW network with a view to increasing the number of promoted inland walks to alleviate pressure on coastal paths.
15. Consider collaboration with public transport operators to create and promote "bus to walk" or "train to walk" linear routes along the South Downs Way. Focus on improving the accessibility of the South Downs Way as a key attraction.
16. Encourage the LVEP to promote less-visited areas of the National Park, helping to distribute visitor numbers more evenly and reduce congestion at popular sites.
17. Explore strategies to effectively manage visitor flows and encourage dispersion from honeypots and hotspots to less crowded areas. Publish information on responsible tourism, the countryside code, and related material.

18. Collaborate with the National Trust to improve amenities at popular walking locations. This partnership might focus on enhancing visitor facilities and services such as dog waste bins and providing clear signage for responsible pet ownership.

Business Network Development

19. Consider an easy-to-read toolkit for tourism economy businesses that outlines best practices for engaging with the SDNPA during planning and development processes.
20. Consider an accommodation network for Airbnb properties to encourage greater connection to National Park principles and to encourage improvements in sustainability / net zero performance.
21. Consider providing resources for Airbnb properties that highlight the National Park's offer, including activities, attractions, and responsible tourism practices. This could include digital toolkits / brochures for guests to enhance their experience and promote sustainable behaviours.
22. Develop and run visitor economy planning workshops to assist visitor economy businesses with their development aspirations.
23. Encourage collaboration among tourism stakeholders by organising workshops and networking events. Engage with the Sussex Hospitality and Tourism Network to help with rolling out regenerative tourism initiatives.
24. Develop clear messaging for accommodation providers to promote responsible visitor behaviour and educate guests on the countryside code. This messaging should emphasise the importance of respecting the natural environment and following local guidelines.
25. Review the South Downs Green Tourism Business scheme and consider modifications in light of other actions under this theme.

Accommodation Supply

Table 7 highlights potential approaches to all aspects of accommodation supply. These recommendations below can be seen to encapsulate the major opportunities.

26. Farms – Consider a farm diversification programme with associated grants and other support, to facilitate camping and caravanning facilities (including glamping), together with the reuse of farm and other heritage buildings for self-catering use, or new build where appropriate.
27. Pubs – Assess the potential of supporting conversion of the 40+ pubs currently without accommodation to include additional rooms.
28. Group & Hostel – Identify operators, developers, and potential sites, with a view to expanding the Houghton bunkhouse concept across the National Park, with priority given to sites within two miles of the South Downs Way.
29. Airbnb – Consider a membership scheme, potentially run by DMOs or LVEPs, and provide materials to help ensure standards are met in the context of the likely Statutory Registration Scheme and possible new Land Use Class C5.
30. Collaborate with vineyards to integrate public transport, making it easier for visitors to explore wine-related attractions while minimising environmental impact. Implement supportive policies for vineyards and local wine tourism, including a vineyard trail, to foster growth in this sector.
31. Develop product and related marketing centred around "slow tourism" experiences that incorporate dark skies tourism, encouraging visitors to appreciate the tranquillity and beauty of the natural environment.
32. Explore opportunities to promote gardens within the National Park as significant visitor attractions, highlighting their unique contributions to the landscape and visitor experience.
33. Investigate ways to elevate the profile of arts and culture within the National Park, which can enrich the overall visitor experience, attract diverse audiences, and help meet a key PMP theme.



8 Appendices

Appendix I – Tourism Economy Accommodation by number of Establishments, Rooms and Beds

Category	Establishments	%	Sub-Category	Est.	%
Serviced	112	36%	Hotel	20	6%
			Hotel - Branded Budget	3	1.0%
			B&B / Guest House	47	15%
			Pub / Inn	42	13%
Non-Serviced	201	64%	Self Catering Apartment	1	0.3%
			Self Catering House / Cottage	120	38%
			Holiday Park / Lodge	1	0.3%
			Group & Youth	11	3.5%
			Camping / Caravan / Glamping Site	68	22%
	313			313	

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

Appendix II – Domestic Tourism Volumes to National Parks in 2019

Table 2.6 - National Parks												
Average of 3 years 2017, 2018 and 2019	All tourism			Holidays			VFR			Business		
	Trips	Nights	Spending (£)	Trips	Nights	Spending (£)	Trips	Nights	Spending (£)	Trips	Nights	Spending (£)
	Millions			Millions			Millions			Millions		
England												
All tourism												
Lake District National Park	2.174	7.431	£534	1.720	6.069	£468	0.324	0.965	£44	0.113	0.370	£19
North York Moors National Park	1.294	4.284	£263	1.046	3.580	£227	0.207	0.586	£27	0.029	0.080	£7
South Downs National Park	2.313	5.773	£391	1.034	2.468	£215	1.014	2.604	£108	0.193	0.480	£54
Peak District National Park	1.774	4.644	£298	0.827	2.313	£183	0.661	1.773	£67	0.215	0.397	£41
The Broads National Park	1.430	5.481	£334	0.795	3.548	£218	0.412	1.245	£52	0.189	0.513	£57
Yorkshire Dales National Park	0.599	1.797	£115	0.453	1.397	£90	0.118	0.303	£19	0.020	0.036	£4
Exmoor National Park	0.504	1.943	£135	0.424	1.735	£115	0.065	0.179	£9	0.014	0.029	£12
New Forest National Park	0.375	1.047	£71	0.241	0.747	£58	0.108	0.257	£11	0.019	0.023	£2
Dartmoor National Park	0.295	1.152	£71	0.203	0.862	£60	0.079	0.253	£10	0.010	0.034	£1
Northumberland National Park	0.123	0.472	£22	0.092	0.362	£17	0.021	0.045	£3	0.010	0.064	£1
Scotland												
All tourism												
Cairngorms National Park	0.566	2.055	£134	0.472	1.775	£115	0.058	0.202	£12	0.030	0.066	£6
Loch Lomond and the Trossachs National Park	0.425	1.134	£71	0.263	0.740	£49	0.102	0.251	£10	0.051	0.125	£11
Wales												
All tourism												
Brecon Beacons National Park	0.526	1.846	£98	0.286	0.974	£55	0.129	0.354	£16	0.074	0.269	£22
Pembrokeshire Coast National Park	0.710	2.985	£180	0.570	2.490	£154	0.114	0.415	£16	0.024	0.065	£9
Snowdonia National Park	1.098	3.414	£200	0.868	2.754	£166	0.154	0.449	£14	0.040	0.098	£6
2019 Great Britain Tourism Survey												

NB:

VisitBritain 2020 Great Britain Tourism Survey 2019 - Table ranked by Holidays / Nights.

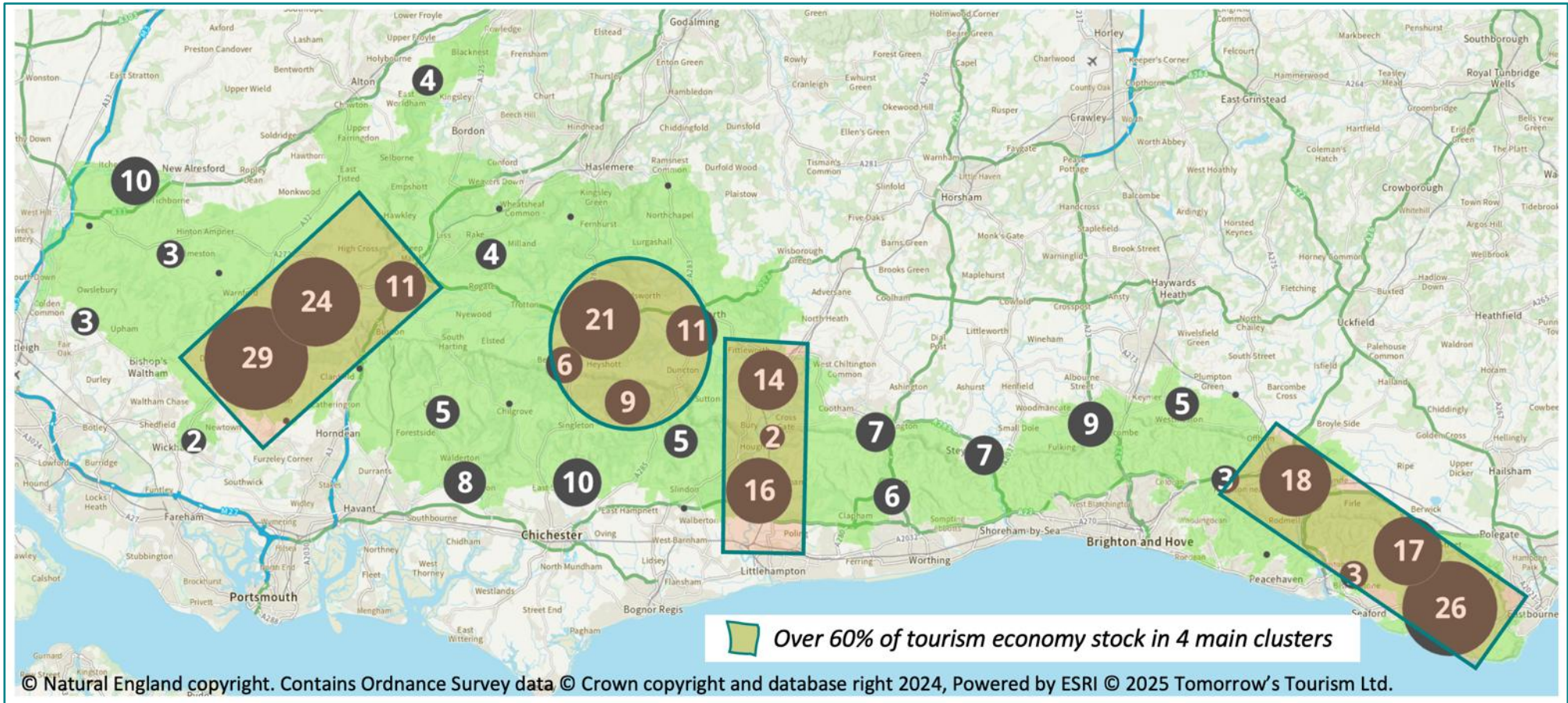
Domestic volumes of 2,468,000 (Holidays) and 480,000 Business visits. Total domestic volume circa 2,948,000 with an estimated 100,000 international visits added making 3,048,000 visits.

Steam UK National Park model reports 18,964,000 visits in 2019, meaning that on the basis of the GBTS figures around +/- 12% of visits were staying. (Indicative figure as methodologies are not strictly comparable. STEAM's estimate is lower at 3.6%).

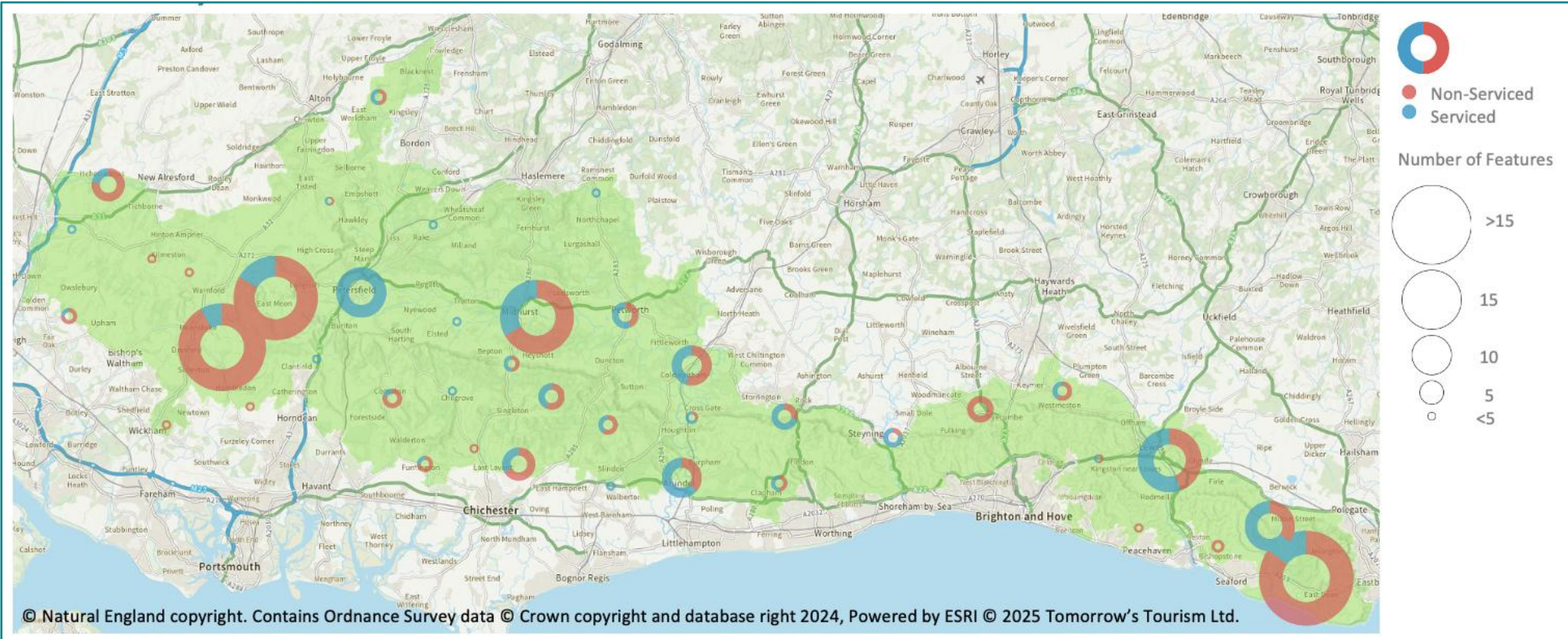
Appendix III – Indicative DMO Landscape



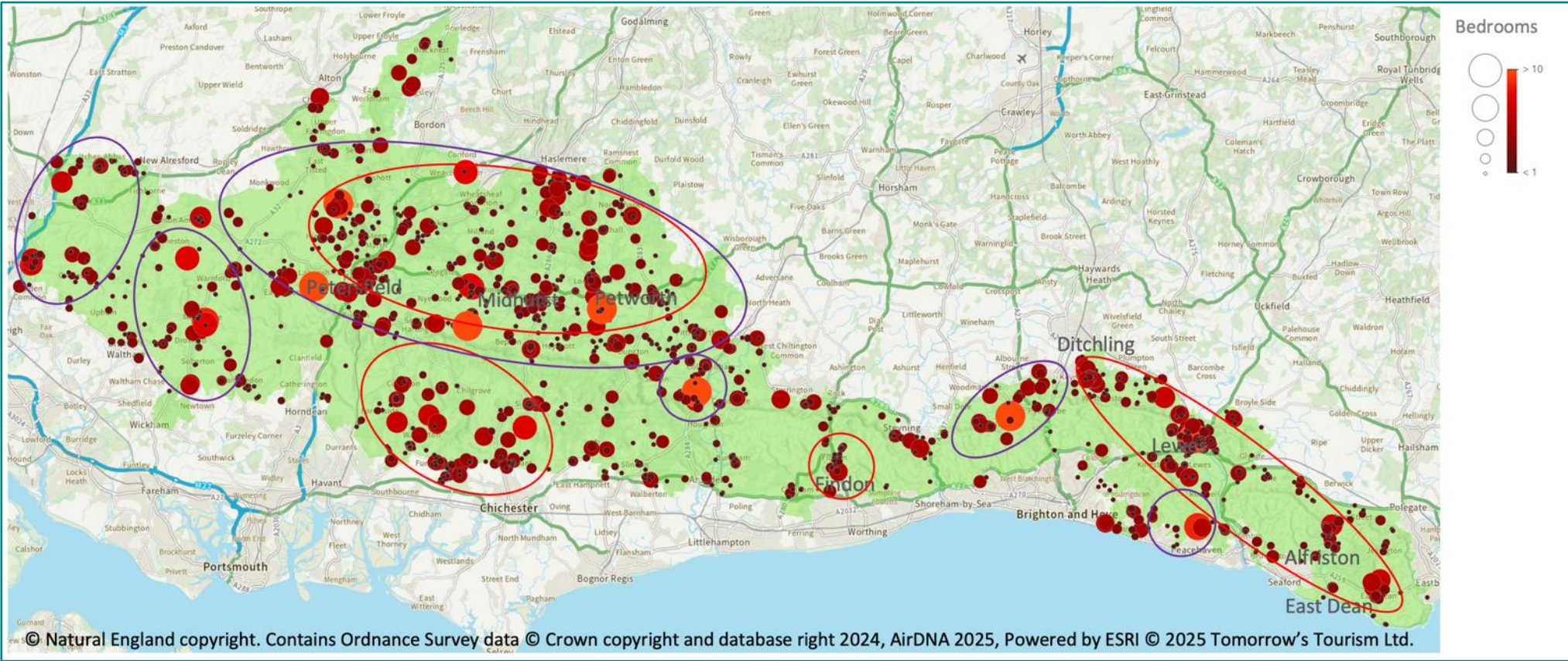
Appendix IV – Tourism Economy Clusters



Appendix V – Tourism Economy Clusters by Serviced and Non-Serviced Accommodation



Appendix VI – Sharing Economy by Clusters and number of Rooms



Appendix VII – Tourism Economy Serviced Accommodation and Vineyards

