

WEALDEN VISITOR ACCOMMODATION STUDY

Pre-Final Report

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TOURISM
SOUTH EAST

CONTENTS

EXECUTIVE SUMMARY	i
1. INTRODUCTION	1
1.1 Background & Brief	1
1.2 Methodology	1
1.3 Study Outputs	2
2. PLANNING FOR TOURISM	3
2.1 National Planning Guidance	3
2.2 Local Planning Policies for the Visitor Economy	5
2.3 Consideration of the South Downs National Park	11
3. POLICY & DEMAND DRIVERS	14
3.1 Destination Vision	14
3.2 National Market Trends & Influences	20
3.3 National Accommodation Product Development Trends	22
3.4 Key Messages	24
4. WEALDEN VISITOR ACCOMMODATION SUPPLY & PERFORMANCE OVERVIEW	26
4.1 Audit Highlights	26
4.2 Changes in Supply	31
4.3 Performance Overview	33
4.4 Gap Analysis	36
5. WEALDEN SERVICED ACCOMMODATION	38
5.1 Hotels	38
5.2 Pub Accommodation	43
5.3 Guest House and B&B Accommodation	46
6. WEALDEN NON-SERVICED ACCOMMODATION	49
6.1 Self-Catering Accommodation	49
6.2 Touring Caravan & Camping	55
6.3 Glamping	59
6.4 Holiday Lodges & Holiday Parks	62
6.5 Group Youth & Activity-Related Accommodation	65
7. VISITOR ACCOMMODATION PLANNING POLICIES	68
7.1 Introduction	68
7.2 Planning Policies in Surrounding Districts	69
7.3 Key Messages	71
8. CONCLUSIONS AND RECOMMENDATIONS	74
8.1 The Opportunity	74
8.2 Recommendations	80
8.3 Concluding Thoughts	86

TECHNICAL APPENDICES (separate document)

- 1 Glossary of Terms – Visitor Accommodation
- 2 Wealden Visitor Accommodation Audit
- 3 Wealden CATI Survey Findings
- 4 Public Sector Funding of Hotel Development Schemes in the UK



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EXECUTIVE SUMMARY

1 The Study Purpose

- 1.1 The Wealden Visitor Accommodation Study has been commissioned by Wealden District Council to provide an independent assessment of the current status of accommodation provision in Wealden District and its potential for future development over its new Local Plan period. The principal purpose of the study is to inform and help shape future planning policies for visitor accommodation development in a new Local Plan for Wealden District.

2 Strategic Market & Development Context

- 2.1 In terms of the tourism vision for Wealden, tourism is an important part of the wider economy, and its growth and development are supported at a strategic level by the South East Local Enterprise Partnership (LEP), East Sussex County Council (ESCC) and Wealden District Council itself. There are a number of emerging themes coming out of the strategy, policy and projects review for accommodation development to support, further and link into. These include walking, cycling, wine tourism, culture, eco-tourism/sustainability, wellness, dark skies, art and heritage.
- 2.2 Market and product development trends, many of which have been accelerated by Covid-19, are presenting all sorts of opportunities to attract new markets and diversify the area's product offer with something more innovative and experiential, also presenting opportunities to reduce seasonality through broadening market appeal. With rural and coastal destinations and leisure-led markets leading the way in post-Covid recovery, Wealden is in a good position to capitalise on these trends.
- 2.3 There is a distinct sustainability thread to Wealden District Council's vision, corporate plan and net zero carbon ambitions, which chimes well to where the market is moving. The visitor economy can help to deliver the Council's sustainability aims through the development of sustainable tourism and the delivery of new and innovative accommodation products with strong eco credentials in both their design and operation, also helping to broaden market appeal.

3 The Supply of Visitor Accommodation in Wealden

- 3.1 This study has assessed the supply of visitor accommodation across the entirety of the Wealden administrative area, which includes part of the South Downs National Park (SDNP¹) that is located to the south of A27 and includes the villages of Alfriston, Friston and East Dean. The study has also identified the supply of visitor accommodation across the Wealden District planning area that excludes the SDNP, which is its own local planning authority. The Wealden District administrative area (including the parts of the district in the SDNP) has 340 visitor accommodation establishments with 11,801 bedspaces, of which 309 establishments and 11,040 bedspaces lie within Wealden's planning area. Non-serviced accommodation accounts for over 80% of the bedspaces and is dominated by touring caravan and camping sites followed by holiday parks. Geographically, the Low Weald accounts for 41% of the bedspaces, with Pevensey Bay the next largest area in terms of bedspaces at 26%. A full breakdown is set out in the table below, with a map of sub-areas shown at Figure 1 and the locations of the establishments shown at Figure 2.

¹ The South Downs National Park Authority (SDNPA) has its own evidence base relating to visitor accommodation that supports their current Local Plan - South Downs National Park Visitor Accommodation Review: Report of Key Findings (Hotel Solutions 2014).

Table 1
WEALDEN ACCOMMODATION SUPPLY BY AREA AND TYPE 2022

Category	ASHDOWN FOREST			HIGH WEALD			LOW WEALD			PEVENSEY			SOUTH DOWNS			TOTALS		
	Establishments	Rooms	Bedspaces	Establishments	Rooms	Bedspaces	Establishments	Rooms	Bedspaces	Establishments	Rooms	Bedspaces	Establishments	Rooms	Bedspaces	Establishments	Rooms	Bedspaces
Hotels	4	178	356	2	12	24	8	436	872	2	25	50	3	82	164	19	733	1466
Pub Accommodation	2	10	20	6	49	99	7	46	86				3	13	26	18	118	231
Guesthouse/B&Bs	4	11	22	15	28	64	13	40	78	4	106	223	4	17	257	40	123	257
TOTAL SERVICED	10	199	398	23	89	187	28	522	1036	6	131	273	10	112	447	77	974	1954
Self-catering	7	9	24	81	128	437	55	102	383	16	38	162	16	42	137	175	319	1193
Touring/Campsites	4	110	366	8	188	164	25	756	2670	4	227	766	2	99	351	43	1380	4767
Holiday Lodge and Park				3	4	19	3	31	122	5	497	1739	1	1	2	12	533	1882
Glamping	1	1	2	11	29	116	3	4	18	1	8	32				16	42	168
TOTAL NON-SERVICED	12	120	392	103	349	766	86	893	3193	26	770	2699	19	142	490	246	2274	8010
Group/Hostel	1		12	6		102	2		360				1		27	10		501
Retreat													1		20	1		20
Riding Centre	1		4													1		4
Scouts	1		235	1	1	750	1		220							3		1205
Wedding Venues							1		27	1		80				2		107
TOTAL OTHER	3	0	251	7	1	852	4	0	607	1	0	80	2	0	47	17	0	1837
TOTAL WEALDEN	25	319	1041	133	429	1825	118	1415	4836	33	901	3052	31	254	984	340	3248	11801
% OF WEALDEN	7		9%	39%		16%	35%		41%	10%		26%	9%		8%			

Figure 1
MAP OF WEALDEN SUB-AREAS

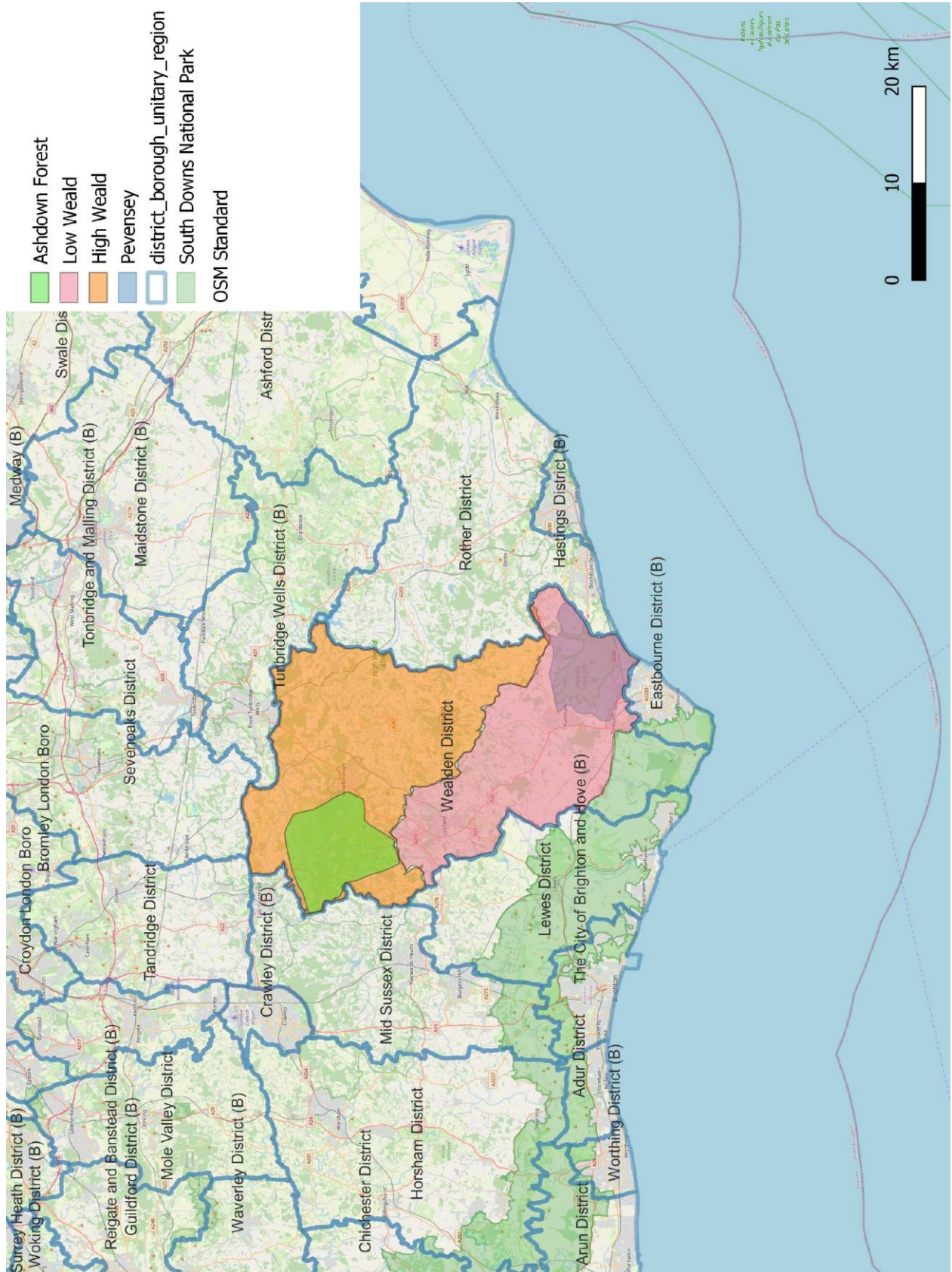
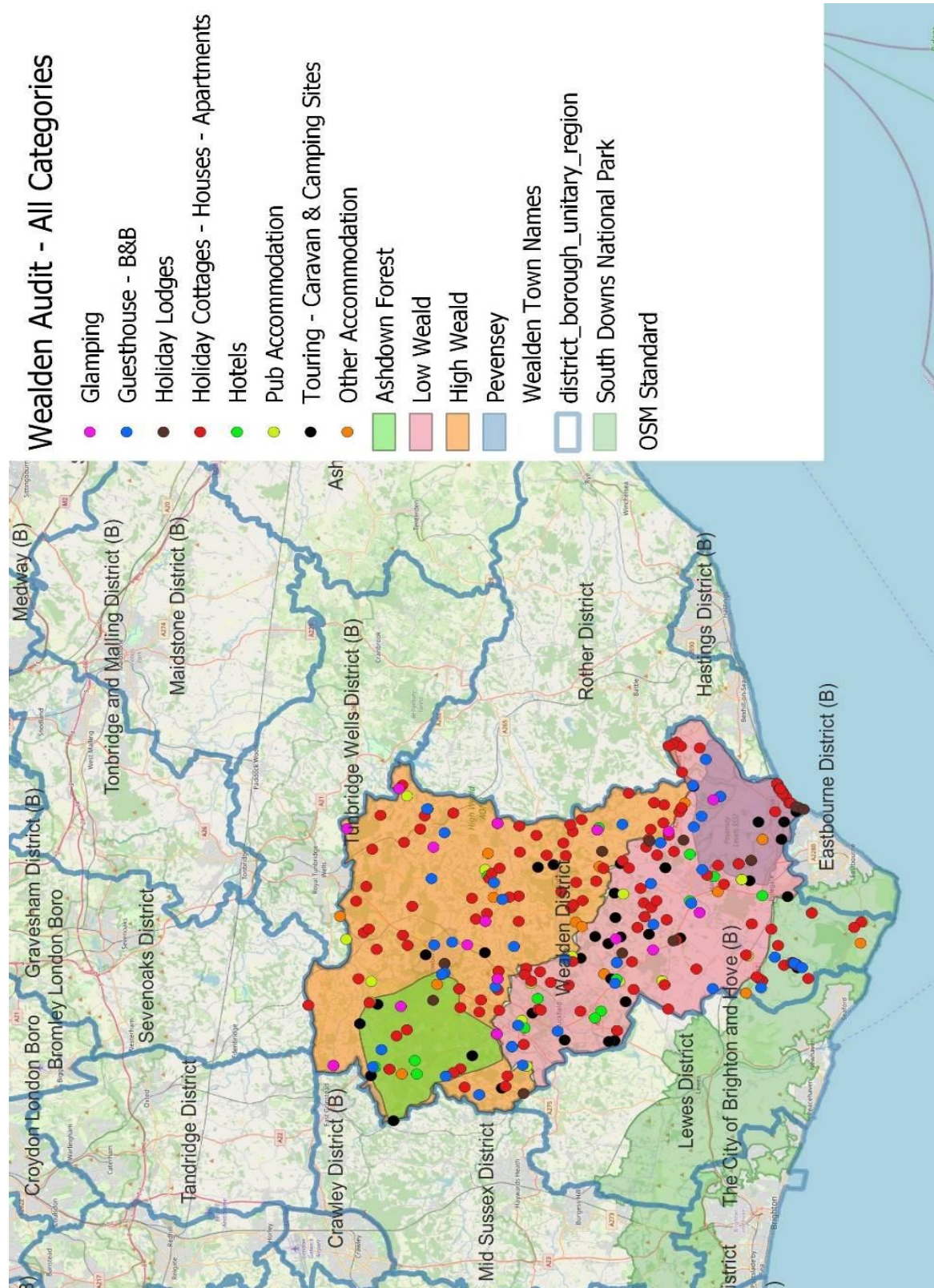


Figure 2

MAP OF WEALDEN VISITOR ACCOMMODATION BY TYPE & SUB-AREA 2022



- 3.2 In terms of other characteristics, 31% of establishments were pet friendly, only 3% were access friendly for wheelchair users (according to the websites of those establishments), and there were only 3 'supercottages' capable of sleeping 15-20 people+ in the district. Just under 24% of properties are advertised on Airbnb.
- 3.3 The supply of visitor accommodation has increased significantly since the last Hotel & Visitor Accommodation Futures Study conducted by Hotel Solutions and Tourism South East in Wealden (2009) – from 259 establishments to 340, and from 8,540 bedspaces to 11,801, an increase of c. 38%. The supply of hotels, touring caravan and camping sites and self-catering accommodation has increased, whereas pub accommodation and guest house/B&B supply has reduced. A new category of accommodation that was not being offered in Wealden in 2009 has emerged in terms of glamping, with 16 establishments and 168 bedspaces now recorded in the district.

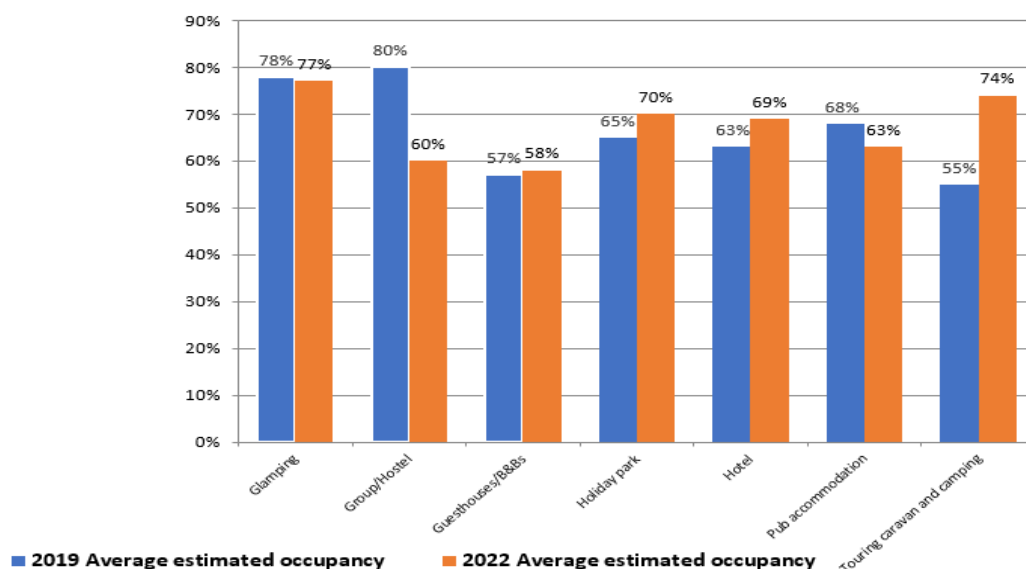
4 Demand for Visitor Accommodation in Wealden

- 4.1 Information gathered through a CATI (Computer Aided Telephone Interview) survey of visitor accommodation operators (see Technical Appendices) indicated reasonably healthy levels of occupancy in 2019 and good bounce back post-Covid-19, albeit there are challenges reported ahead particularly relating to energy costs, staffing, levels of debt and market confidence.

Figure 3

WEALDEN VISITOR ACCOMMODATION - ROOM OCCUPANCY 2019-2022

Indicative occupancy levels 2019 and estimated 2022



- 4.2 Key markets identified by businesses undertaking the survey were couples, families and multi-generational families and groups, coming for short breaks, walking and outdoor activities, events and attending weddings as well as family parties. There is a seasonal dimension to the market, which peaks between June and September, with the wider season running from March to October.
- 4.3 Performance from a wider data set of Vrbo and Airbnb booking platforms shows growth in supply of 11% between 2019 and 2022, growth in Average Daily Rate of 23.8% from £105 to £130, and growth in occupancy from an average of 68% in 2019 to 74% in 2022. Occupancies in peak months averaged 94%. Total revenue growth between 2019-2022 for non-serviced accommodation in Wealden is 33%. 74% of stays were for 2 nights or less.

5 The Rationale for the Development of Additional Visitor Accommodation

- 5.1 The rationale for developing additional visitor accommodation in Wealden focuses on changing the balance of day and staying visitors, their relative contributions, and broader strategic ambitions for the role that tourism and visitor accommodation should play in the district's economic, social and environmental ambitions. Most notably:
- To gain the greatest economic impact from tourism, with the fewest numbers of visitors, the focus of activity should be about growing staying visitors as a priority;
 - Much of the existing visitor accommodation is performing at very high occupancies or are full during the peak summer months and school holidays, requiring additional visitor accommodation development to grow the market;
 - There is also some capacity to grow business outside peak periods and fill some of the spare capacity at those times;
 - However, some accommodation, notably caravan and camping sites, are constrained from operating in the winter months by planning restrictions despite there being latent demand;
 - Also, some alternative types of accommodation will be needed to attract new markets that will travel for different reasons and at different times to level out seasonality peaks, including innovative and emerging accommodation offers such as glamping and treehouses, and products linked to activities and

experiences such as walking and cycling focused lifestyle hotels, with scope to generate new demand;

- The development of high-quality visitor accommodation can also help to maximise spend further;
- Trends in the market nationally are very much in favour of destinations like Wealden that seem to be leading recovery with leisure-led offers and coastal and rural appeal for outdoor activities, wellness and experiences;
- There is strong developer and operator interest in bringing forward new visitor accommodation in Wealden if the main barriers of site availability, funding and planning can be overcome.

6 The Opportunity

6.1 Market potential in Wealden has been identified for the **accommodation development opportunities** that are set out below.

- **Hotels & Other Serviced Accommodation**

- A luxury destination country house hotel, potentially of 5-star standard with spa and associated facilities, if a suitable property with grounds can be found for conversion and expansion;
- A small (c. 40 bedroom) boutique hotel with a fine dining food offer, likely a conversion opportunity in a rural setting;
- A lifestyle hotel, for example an offer that is geared to walking and cycling and particularly serving these types of outdoor markets and is pet friendly;
- Budget hotels in town centres or potentially edge of town/major routeways especially if demand drivers such as business parks are located there;
- New-build pub/restaurants with associated lodge accommodation, on gateway sites along major routeways, on business parks or major housing developments;
- The addition of bedrooms to pubs, including luxury accommodation linked to gastro pubs and fine dining offers;
- The addition of serviced bedrooms to restaurants, wedding venues, activity venues and potentially attractions;
- A 'deconstructed' hotel in a rural/estate setting that combines serviced accommodation and lodges/other non-serviced units with some facilities developed across woodland, parkland and lakeside to provide space for individual immersive experiences;

- The upgrading, expansion and re-positioning of existing hotels and serviced accommodation in line with market expectations and to support their long-term sustainability.

- **Non-Serviced Accommodation**

- The upgrading and expansion of existing non-serviced accommodation, particularly where it helps to deliver a more viable unit with critical mass and can cater for target markets as identified by the tourism strategy (i.e. empty-nesters, families/multi-generational families, special interest groups such as walking, cycling and viticulture, and people with disabilities);
- Additional self-catering cottages, including some small complexes with leisure;
- Supercottages capable of taking large groups of family and friends under one roof, (15-20+ people) often with associated facilities;
- Some National Accessible Scheme 'access exceptional' self-catering units offering full wheelchair access but also catering for a wider range of mobility and sensory disabilities, which the audit identified a real scarcity of, to cater for a growing market with disabilities;
- Motorhome stopovers, like the French 'aires', that could be on Council owned car parks, in country parks, along seafronts, alongside pubs, or even at visitor attractions;
- Additional touring caravan and camping provision, including for Clubs such as Caravan & Motorhome Club, that could deliver some glamping and camping pods in addition to pitches for Members;
- Holiday lodges and eco lodges, in small groups but with potential for mid-scale sites (40-50 units) without leisure, and larger sites (100-150 units) with leisure, if suitable sites could be found;
- Additional glamping provision of all types, but particularly units that can be let all year (not canvas), plus some unusual and quirky units, including treehouses, and the adoption of a strong sustainability thread in their design, operation and setting;
- A wellness resort in a rural setting, c. 20 units, with eco-lodges and holistic therapies.

6.2 The opportunities identified above are not necessarily location-specific, they rather relate to finding **deliverable sites** that can meet the requirements of developers and operators. The coast, the National Park, the High Weald AONB, Ashdown Forest are all features that make Wealden a desirable location for accommodation investment because they drive demand; however, they represent sensitive landscapes or

ecological features that will make it more difficult to develop for visitor accommodation, particularly within or adjacent to these features, although sites in reasonable proximity to these locations could be considered. The optimum locational strategy for the development of visitor accommodation would be to develop accommodation in association with attractions, facilities, farms, estates, pubs, vineyards etc. that already have demand, a built footprint/activity/use on the land and have a base of infrastructure on which to build. At the same time, accommodation can help make that existing facility more viable and sustainable by generating more income. These sites may not be suitable for all visitor accommodation types (or indeed, any dependent on the location), so other sites will likely be required to meet their needs. Those with market fit might be woodlands, reservoirs, large estates and farms, business parks, schools/offices/conference centres in extensive grounds, heritage buildings in countryside locations, roadside sites located close to towns and facilities, country parks, car parks and town centre/regeneration sites. Whilst national planning policy directs visitor accommodation uses to town centres initially, the National Planning Policy Framework (NPPF) recognises that sites beyond existing settlements may be required to meet business needs and that sustainable tourism development which is respectful of the countryside has a role to play in supporting a prosperous rural economy.

- 6.3 The identified market potential is matched with developer interest in the table overleaf. This interest was identified through a process of soft market testing with over 20 national hotel and visitor accommodation developers, investors and operators known to be active in the market nationally. The table provides more detail on this interest by type of offer, scale and site requirements.

Table 2

WEALDEN MATCHING DEVELOPER INTEREST & MARKET POTENTIAL			
ACCOMMODATION OFFER	SIZE ROOMS/ UNITS	DEAL	REQUIREMENTS/ COMMENTS
Budget hotel	70-80 room	Potential for Council investment	Roadside and town centre 1-1.5 acres
Mid-scale hotel	100-120 rooms	Franchise or management	Needs public sector support to stack up
4-star hotel	120-150 room	Franchise or management	Conversion
Small boutique hotel	40 room	Franchise or management	Rural setting Conversion
Small boutique hotel	30-40 room	Freehold	Potentially some cabins Kitchen garden needed
Destination hotel	40-100+ rooms	Freehold or franchise/management	Rural setting
Lifestyle hotel	70 room	Lease and manage	Rural setting
New pub/restaurant/lodge	30 room	Freehold	Needs 30k population in 3 miles 1.4 acres
Caravan & Motorhome Club	120 pitch 20 pods/ lodges	Lease	Requires 25 acres
Holiday lodge park (no facilities)	40-50 units	Freehold/ Long leasehold	Requires 5 acres
Holiday lodge park (central facilities)	120-200units	Freehold/ Long leasehold	Requires 40-70 acres
Holiday lodge park (with leisure facilities)	120 units with leisure	Freehold/ Long leasehold	Requires 15 acres
Eco lodge development	15-40 units	Partnership with landowner Freehold/ Long leasehold	Developer operates
Wellness resort	20-30 units	Partnership with landowner Freehold/ Long leasehold	Strong sustainability credentials. Work with an investor
Eco cabins	6 units	Partnership with landowner Freehold/ Long leasehold	Landowner operates
Treehouse development	7-10 units	Partnership with landowner Freehold/ Long leasehold	Developer operates

7 The Way Forward

Planning Recommendations

- 7.1 Planning recommendations should focus on providing information to assist in policy formulation with the purpose of facilitating the development of visitor accommodation for which market potential has been identified, and to also provide both direction and clarity to the market. Policy options that could be considered include the following dependent on the Council's strategy:
- Embedding the role of tourism and the desire to grow the market through accommodation development into Local Plan strategic objectives, economic policy and countryside policy, linked to tourism strategy and market evidence. This will provide 'hooks' on which to hang permissions, especially in the countryside.
 - The main sustainable tourism policy could set out a tourism vision, could provide the rationale for visitor accommodation development and positively support accommodation development at an overall level. If this approach is considered, it could articulate the types of accommodation the district would like to ideally see. A locational strategy would not be required as suitable locations for development, including that relating to tourism, will be set by the Council through its Local Plan policies taking into account national planning policy also. There are three issues that could be considered:
 - Support visitor accommodation in principle (subject to meeting the requirements of other Plan policies). This can include new and expansion/re-positioning of existing accommodation, on a year-round basis as relevant, and be flexible to respond to a dynamic sector;
 - Support a rural setting for some types of visitor accommodation, (subject to meeting the requirements of other Plan policies) providing opportunities for farm diversification and encouraging accommodation development linked to existing infrastructure to support their sustainability. Allowances may also to be made for some small scale, well designed, new build sustainable visitor accommodation and for staff accommodation within some rural accommodation developments. This could include consideration of accommodation development to support wider tourism development initiatives, such as the viticulture industry.

- Develop a robust retention policy covering all forms of visitor accommodation, with some detailed guidance on criteria and requirements to allow for their loss in exceptional circumstances.
- Other planning actions and considerations could include:
 - The preparation of a Supplementary Planning Document (SPD) for tourist accommodation to set out detailed guidance for the sector;
 - The opportunity to work with landowners and their agents to engage them in bringing forward visitor accommodation sites and developments;
 - Introducing alternative planning conditions to control holiday uses without requiring seasonal opening;
 - Working with major estates and key attractions to develop masterplans and estate plans to include visitor accommodation development in an integrated way;
 - Look at working with neighbouring districts to introduce some consistency into certain visitor accommodation policies (e.g. around retention); and
 - Introduce better mechanisms for monitoring visitor accommodation development through the local planning system and the new Local Plan.

Inward Investment Response

7.2 A proactive approach to inward investment presents an opportunity to accelerate development coming forward and to direct it in a form, content and location to best meet destination objectives. Recommended actions include:

- Following up interest expressed in visitor accommodation development from both existing operators looking to expand, upgrade or re-position, and from developers and operators interested in new-build opportunities.
- Understanding in more detail the site and locational requirements of accommodation developers and operators to identify suitable and deliverable sites – both sites in the Council's ownership and privately owned.
- Exploring opportunities for partnership working between landowners and brand owners/operators – including the potential for Wealden District Council to invest or in some way partner a developer or operator to yield income and bring forward new infrastructure.

Wider Destination Development & Sector Support

- 7.3 There are a number of areas where the Council and its partners have an important role to play to help develop the destination and support it. These include:
- Working with other public sector bodies to ensure that infrastructure investment takes place to support the visitor accommodation sector.
 - Acting as a catalyst to initiatives such as those set out within the Wealden Viticulture Feasibility Study (2018²), including the potential for visitor accommodation development.
 - Co-operating with partners across Sussex on marketing and development initiatives such as those identified by Blue Sail and weaving visitor accommodation development into them.
 - Continued marketing and awareness raising to help build market demand, with a focus on the off-peak season, to reduce seasonality.
 - Consider providing other support requested by operators in the CATI survey and interviews, including marketing/social media, funding, networking, planning help and support, better transport links (this is largely dealt with through the County Council) and rates reductions.

8 Concluding Thoughts

- 8.1 With a new Local Plan being progressed, Wealden District Council has a real opportunity to deliver a planning framework that supports tourism and in particular, the visitor accommodation sector. Positive planning will be key to future success. The availability and delivery of suitable sites is a barrier to bringing development forward and to some extent, this is market led and is outside the Council's direct control. However, the potential is clearly there; a proactive approach to inward investment and destination development/marketing coupled with a positive planning approach cannot just make it happen but can accelerate and direct development to maximise the benefits it can bring.

² [Wealden Viticulture Feasibility Study \(March, 2018\)](#)

1. INTRODUCTION

1.1 Background & Brief

- 1.1.1 The Wealden Visitor Accommodation Study has been commissioned by Wealden District Council to provide an independent assessment of the current status of visitor accommodation provision in Wealden District and its potential for future development. The principal purpose of the study is to inform and help shape future planning policies for visitor accommodation in the new Local Plan.
- 1.1.2 The study builds on a similar research piece for Wealden District, undertaken in 2009 by Hotel Solutions, together with a Visitor Accommodation Audit undertaken by Tourism South East in 2018. Where possible, comparisons have been made with the previous study in relation to trends and the change in visitor accommodation provision over time.

1.2 Methodology

- 1.2.1 The study has involved the following key modules of work:
- A review of relevant policy and strategy documents to establish the strategic context for growth, the direction of travel in destination development, and potential drivers to visitor accommodation demand;
 - A review of national trends in demand, including the impacts of Covid-19 and prospects for recovery;
 - A review of trends in accommodation product development nationally, to inform the supply gap analysis and to point towards potential opportunities;
 - Stakeholder consultations with relevant Council Officers (tourism, planning, economic development, estates) as well as external consultees, neighbouring authorities and wider partnership organisations;
 - An audit of current visitor accommodation supply across the range of serviced and non-serviced offers to establish a baseline and to better understand the gaps in provision by type, size, standard and location;
 - A review of proposals for visitor accommodation development, through interrogating the planning system and through intelligence gathered from consultees and other research modules;

- An assessment of visitor accommodation performance, markets and prospects through a survey of operators via site visits, telephone and email consultations, and a CATI survey of smaller visitor accommodation operators;
- A soft market testing exercise with visitor accommodation developers, operators and investors to provide an indication of potential interest for new visitor accommodation development, and particularly developments of scale;
- A review of planning policies for visitor accommodation development in adopted Local Plans in neighbouring areas, particularly in terms of policies for visitor accommodation development in the countryside; and
- An overview of public sector investment in hotels and visitor accommodation projects in the UK.

1.3 Study Outputs

1.3.1 This report details the key findings of the research, with conclusions around:

- A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis as the basis for identifying and setting out the future requirements for hotels and visitor accommodation development across the Wealden planning policy area (which excludes the parts of the district within the SDNP).
- Recommendations for action in terms of:
 - Planning policy recommendations and addressing issues identified around NPPF policy and the delivery of visitor accommodation development in the countryside;
 - Inward investment recommendations around:
 - How the Council can accelerate visitor accommodation development;
 - How to encourage rural diversification;
 - Commercial opportunities for the Council to consider; and
 - Destination development and management recommendations relating to how else the Council can support the sector and its future growth.
- Summaries of the various modules of work are attached as Appendices as the supporting evidence for the findings.
- The outputs also include a Microsoft Excel database of the supply of visitor accommodation with associated GIS mapping.
- A de-brief/presentation of findings.

2. PLANNING FOR TOURISM

2.1. National Planning Guidance

2.1.1 The **National Planning Policy Framework (NPPF)** provides the national planning policy position, which local authorities must work within both in the preparation of their Local Plans and the implementation of development management policies when determining planning applications. First published in 2012, it has been updated on several occasions including 2018, 2019 and 2021 and is expected to be amended once more this year.

2.1.2 The NPPF (July 2021) states relatively little directly about tourism. The principal references in relation to rural tourism development are:

- Building a strong competitive economy (Section 6)
 - Paragraph 84 of the NPPF includes policies to support a prosperous rural economy that includes a specific reference to sustainable rural tourism and leisure developments which respects the character of the countryside;
 - Also of relevance as context to this and where visitor accommodation might have a role to play are:
 - The need to recognise and address specific locational needs of different sectors (para. 83);
 - The potential for expansion of rural businesses and/or diversification of rural estates (para 84b); and
 - The retention of local services and community facilities in rural areas, such as pubs, (para 84d).
 - Paragraph 85 the NPPF states that planning policies and decisions should recognise that sites to meet business needs in rural areas may be found beyond existing settlements and in locations not well served by public transport. It goes on to state that in these circumstances, it will be important to ensure that development is sensitive to its surroundings, does not have an unacceptable impact on local roads and exploits any opportunities to make a location more sustainable.
- Ensuring the vitality of town centres (Section 7)
 - Tourism development, including hotels, are identified as a main town centre use in the Annex 2: Glossary of the NPPF.

- Paragraph 86 of the NPPF confirms that a range of suitable town centre sites should be allocated looking at least 10 years ahead to meet the scale and type of development needed;
- Paragraph 87 of the NPPF confirms that the sequential test should be applied to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located in town centres, then in edge of centre location; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.
- Paragraph 88 of the NPPF confirms that when considering edge of centre and out of centre proposals, preference should be given to accessible sites, which are well connected to the town centre.
- Paragraph 89 of the NPPF confirms that the sequential approach should not be applied to small scale rural development, albeit that there is limited detail as to what small-scale is in this context.

2.1.3 Previously, national planning policy guidance on the development of visitor accommodation came in the form of the 'Good Practice Guide on Planning for Tourism' (2006), which contained a specific appendix on tourist accommodation, dealing principally with the location of accommodation. Following the advent of the NPPF in March 2012, this guidance was subsequently cancelled on 7 March 2014. The Tourism Alliance have repeatedly lobbied government on this matter and are continuing to press for a reintroduction of the Good Practice Guide, particularly to facilitate rural tourism growth by providing direction and clarity for local authorities and businesses.

Visit Britain – Tourism Planning Guidance

2.1.4 There remains a six-point **Tourism Planning Guidance** framework on the VisitBritain website (available at: <https://www.visitbritain.org/tourism-planning-guidance>). It addresses the following issues:

- How should tourism developers maximise the economic benefits of tourism for their areas?
- How should tourism uses be accommodated in urban areas?
- How should tourism be accommodated in rural areas?

- What are the key locational considerations in choosing the best site for tourism development?
- How can tourist accommodation be maintained as a tourism use?
- What about applications for permanent staff accommodation?

2.2 Local Planning Policies for the Visitor Economy

Wealden Local Plan Documents

- 2.2.1 The current Wealden Local Plan is made up of 'saved' policies from the adopted Wealden Local Plan (1998) and the adopted Wealden District Core Strategy Local Plan (February, 2013)³. There are also adopted Neighbourhood Plans for the Parishes of Hailsham (2021), Hellingly (2021) and Herstmonceux (2019).

Wealden Local Plan (1998)

- 2.2.2 The Wealden Local Plan (1998) had a chapter on Tourism and ten related policies that have been 'saved' as of 27 September 2007, in the absence of a replacement Local Plan with development management policies being adopted. This can be found at the following web link: <https://www.wealden.gov.uk/UploadedFiles/Chapter10.PDF>.

Wealden District Core Strategy Local Plan (February 2013)

- 2.2.3 The Wealden District Core Strategy Local Plan (February 2013) includes Tourism as a **Key Element of the Spatial Strategy** (p17-18) and an extract from this plan is presented overleaf:

³ It should be noted that the Council has also adopted the Affordable Housing Delivery Local Plan in 2016 but this does not relate to tourism.

Tourism

3.27 The South Downs National Park, the Ashdown Forest, the High Weald Area of Outstanding Natural Beauty, the coast, the District's market towns and villages all attract visitors to Wealden. Employment related to tourism (in areas such as hotels and guest houses, caravan parks, shops and restaurants, visitor attractions etc.) is a significant contributor to the economic performance of the District. Tourism also supports facilities and amenities which can be enjoyed by residents as well as by visitors to Wealden. The protection and maintenance of high quality environments throughout the District add to the quality of life for all.

3.28 The Council's strategy is to increase visitor spending by:

- retaining serviced and non-serviced accommodation wherever possible, and supporting the development of new accommodation where appropriate including bed and breakfast accommodation;
- encouraging and supporting tourism businesses to adapt to change, and to provide the opportunity to extend the length and frequency of tourist visits;
- encouraging appropriate tourism initiatives which promote use of environmental recreational resources in an environmentally responsible manner and encouraging the re-use of suitable redundant rural buildings for tourism and visitor purposes;
- supporting the improvement of the quality of existing attractions, where appropriate;
- enhancing the town centres by promoting the role of tourism in the regeneration of settlements;
- supporting measures that relieve tourism and visitor pressures on the most vulnerable parts of Wealden's environment specifically the National Park, Ashdown Forest and the Pevensy Levels and which would help visitor management to protect and enhance vulnerable habitats and landscapes; and
- improving the quality of recreational opportunities and managed access to sites with tourism potential.

3.29 Policies concerning tourism within Wealden, following this strategy, will be contained within the Site Allocation DPDs, unless already contained within national guidance.

2.2.4 Tourism is also referenced in the **Vision & Spatial Planning Objectives** section of the Wealden District Core Strategy Local Plan (p21):

SPO2 We will ensure that the intrinsic quality of the historic environment is protected and that Wealden's environmental, heritage and cultural assets are used appropriately to encourage suitable tourism development and support inward investment

2.2.5 Although there was a paragraph within the Wealden District Core Strategy Local Plan (2013) that details the Council's Strategy on tourism, no local planning policy on this topic was devised and/or adopted as part of the Core Strategy Local Plan. The Core Strategy (2013) provided strategic policies only and did not therefore provide detailed development management policies associated with tourism. It should be noted that policies concerning tourism within Wealden would have been contained within the Site Allocation DPD, but this never came forward.

Neighbourhood Plans

2.2.6 Each of the adopted Neighbourhood Plans in Wealden District for Hailsham (2021), Herstmonceux (2019) and Hellingly (2021) considers tourism and includes a related planning policy for the Parish area.

Hailsham Neighbourhood Plan (2021)

- 2.2.7 Hailsham Neighbourhood Plan (2021) identifies tourism as a key issue in its Neighbourhood Plan. It sees a role for the town as the gateway to the South Downs National Park and is keen to build on this and to provide a base from which to visit surrounding areas, such as the Ashdown Forest, Pevensey Levels and Eastbourne. The plan seeks to maximise the economic benefits of tourism and attract associated inward investment, including opportunities to contribute to the development of the town's evening economy. The Cuckoo Trail also features in the plan as an important sustainable route for walking and cycling, linking to the South Downs Way and the High Weald Area of Outstanding Natural Beauty (AONB). The adopted tourism policy in the Hailsham Neighbourhood Plan (p47) is generally supportive of tourism development (subject to appropriate scale, siting and design) and aims for the retention of tourism assets. This is provided as an extract below.

Policy HAIL TOU1: Tourism

Sustainable development that improves the quality and diversity of existing tourist facilities, attractions, accommodation and infrastructure, including green infrastructure, will be viewed favourably. Applicants for new build development will be required to demonstrate that:

- the siting, scale and design has strong regard to the local character, historic and natural assets of the surrounding area; and
- the design and materials are in keeping with the local style and reinforce local distinctiveness and a strong sense of place.

The loss of tourist facilities to other uses will not be permitted unless:

- it can be demonstrated that the tourist facility is no longer viable, having being actively marketed for a period of twelve months; or
- the proposed alternative use would provide equal or greater benefits for the local economy and community.

Where appropriate, tourist development outside the built-up area will be assessed in terms of its visual, landscape and transport impacts, and long term measures to encourage sustainable travel, environmental stewardship and overall good site management may be required.

Herstmonceux Neighbourhood Plan (2019)

- 2.2.8 The Herstmonceux Neighbourhood Plan (2019) also makes reference to tourism, identifying the Castle and Observatory Science Centre as a strength. It makes reference to spatial planning objectives in the current Wealden District Core Strategy Local Plan (February 2013) that it sees as most relevant to Herstmonceux, which includes SPO2 that encourages suitable tourism development and supporting inward

investment, whilst protecting the environment and heritage of the area. There is a specific policy (p45) for Herstmonceux Castle and estate included in the plan as set out below:

Policy 3: Herstmonceux Castle and Grounds

Proposals for development that will support the use of Herstmonceux Castle and Grounds for the purposes of tourism, recreation, leisure and education will be approved, provided that the development has been designed to preserve and sustain the historic interest and interest and landscape amenity of the Scheduled Ancient Monument of the castle or its associated listed buildings and their setting and the Registered Parks and Garden as shown on GS01 – Herstmonceux Castle and Grounds .

Any development relevant to this policy must be subject to a Habitats Regulations Assessment

Hellingly Neighbourhood Plan (2021)

- 2.2.9 The element of the Hellingly Neighbourhood Plan (2021) of relevance to this study is the focus as a rural area dominated by farming and the importance of farm diversification, including to tourism uses. Continued support for this is seen as crucial for the future of farming in the parish. There is an associated policy (p21), as part of this section, on support for the local economy, included in the plan as set out below.

Policy HNBP 6 – Rural Economy

Proposals for the diversification and development of agricultural and other land based rural businesses will be supported. In supporting such proposals developments will be required to demonstrate safe and suitable access, well designed buildings and that the character of the countryside/rural area is not adversely affected.

(Core Strategy SPO1, Saved Policies DC5, DC6, DC7)

Wealden Local Plan Review

- 2.2.10 Looking to the future and the emerging Local Plan, the Council produced a **Direction of Travel Consultation⁴** document in 2020 that included a section on tourism and provides a more up-to-date view on the issues, challenges and options for the tourism sector going forward. Some key messages coming out of this document were as follows:

⁴ [Wealden Local Plan – Direction of Travel Consultation, November, 2020](#)

- Recognition of the importance of tourism and its contribution to the cultural environment and economy;
- The challenge of protecting the landscape whilst providing opportunities for tourism businesses to develop;
- The need for more accommodation, of the right type, to increase overnight stays and maximise benefits from tourism spending and activity;
- The need for more serviced accommodation particularly to develop new markets such as wine tourism;
- The need to attract higher spending, longer staying visitors;
- The policies as they stand focus on a limited segment of provision – caravans, camping and holiday parks;
- Growth areas to respond to include wine tourism, experiential tourism and sustainable tourism;
- The need for local plan policies to support new tourism opportunities for the district;
- The need to develop a comprehensive destination management plan to clearly articulate the tourism strategy that the local plan needs to help deliver in terms of built development and planning use;
- More overnight visitors are important, as is increasing spend, but there is also an ambition to increase length of stay – which certain products like self-catering cottages, lodge parks, holiday parks and caravan and camping facilities are better suited to. The challenge will be finding sites and products that can do this at the same time integrating with and enhancing the landscape, biodiversity and a sustainable future for the tourism industry and Wealden's wider communities; and
- The option to develop a Tourism Accommodation Supplementary Planning Document (SPD) to support related policies in the Local Plan in terms of rationale, process and detail behind the thinking and policy development.

2.2.11 In terms of the spatial strategy for Wealden and the quantum of growth which could drive some elements of demand for hotels and other forms of visitor accommodation, the **emerging Wealden Local Plan** currently considers its housing need under the 'standard methodology' to be for 20,400 new homes over a 17 year period although meeting this need is subject to constraints that includes transport and landscape (amongst other issues), along with support infrastructure. In terms of employment growth, the Council's latest evidence base⁵ shows that there is limited shortfall in

⁵ [Employment and Economic Study for Eastbourne and Wealden, April 2022](#)

office requirements of -1.5 to -5.7 ha, but a far greater shortfall for industrial and warehousing needs of -37.1 ha up until 2039. The Council has also undertaken a Town Centre Study⁶ (July 2022) that shows that there is no retail development needed in the short term within Wealden District, albeit that there may a small amount of growth at the end of the period in 2039. This evidence shows that the Council is unlikely to allocate land for retail development within the emerging Local Plan. Given the constraints on development relating to protected landscapes to the north of the district, it is likely that much of this growth will likely be delivered in the Low Weald, particularly around Hailsham, Uckfield, Polegate and other land to north of Eastbourne, albeit that some growth will be delivered in existing settlements across the district.

⁶ [Wealden Town Centre Study, July 2022](#)

2.3 Consideration of the South Downs National Park

2.3.1 This study focuses on the parts of Wealden District Council's area that are not located within the South Downs National Park (SDNP), as these are the areas that Wealden District Council has planning jurisdiction over. The South Downs National Park Authority (SDPNA) considers both Local Plan policies and determines planning applications in its own area. The map at Figure 4 shows the SDNP area extending into Wealden District in its south west corner and to the south of the A27 towards the coast. This includes villages such as East Dean, Friston and Alfriston, as well as visitor attractions such as Drusillas Zoo.

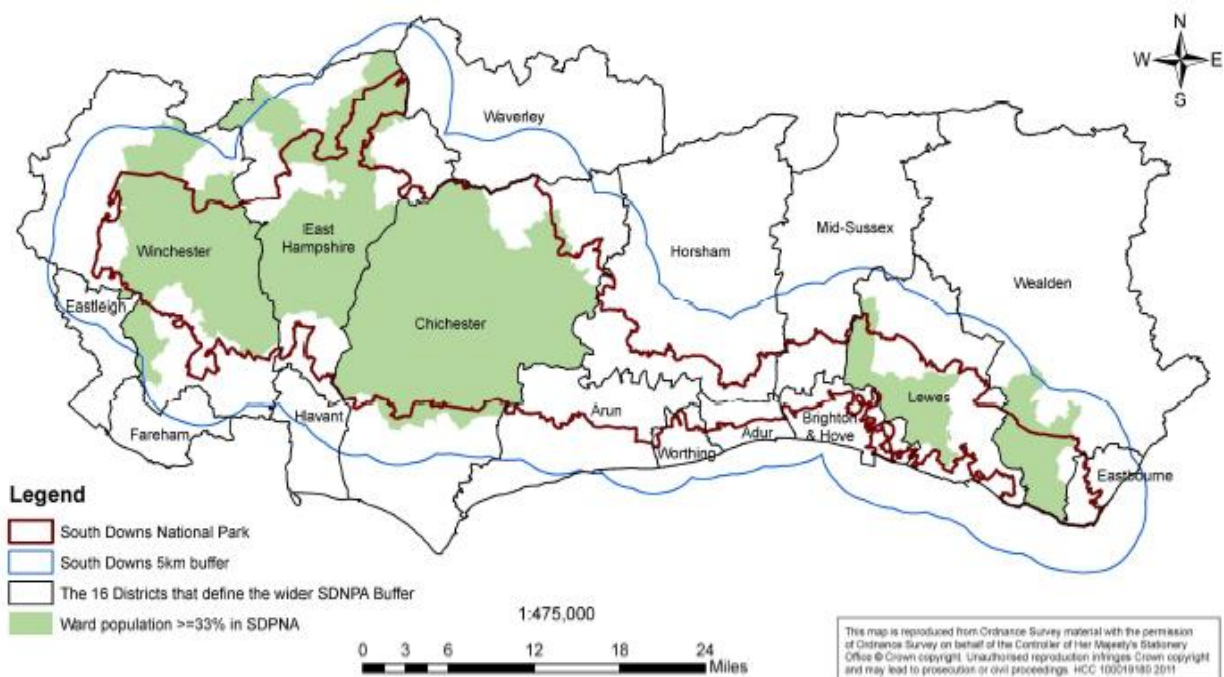
Figure 4

WEALDEN CHARACTER AREAS INCLUDING SOUTH DOWNS NATIONAL PARK



2.3.2 However, the National Park should not go without mention in any discussion of planning for tourism affecting Wealden District. The National Park is a major driver of demand for visitors to Wealden and travelling through the district, and there is a natural/functional relationship between the tourism infrastructure in these contiguous areas, whoever makes decisions on planning applications. There is no need we feel to go into the SDNPA's policies and framework here (we touch on these in our rural planning policy review at Section 7 in any case); but our more generic point is the opportunity for sites outside the National Park (i.e. in Wealden) to serve the National Park market, and potentially to be developed for schemes that might not be acceptable in the more sensitive landscape of the Park itself – particularly developments of scale. There is a 5km buffer zone identified by SDNPA (illustrated in Figure 5 below) where such developments might be delivered, but potentially they could sit beyond this and still be in close enough proximity for visitors to have appeal to and serve the National Park. This is a real opportunity for Wealden – if there is the appetite in planning and strategy terms to take advantage of it and there are suitable locations in policy terms where such sites could be delivered.

Figure 5
SOUTH DOWNS NATIONAL PARK ADMINISTRATIVE AREAS & 5KM BUFFER ZONE



Source: Hampshire County Council

3. POLICY & DEMAND DRIVERS

3.1 Destination Vision

Regional Policy Action & Opportunity

- 3.1.1 At the regional level, Wealden District sits within the **South East Local Enterprise Partnership** which positions itself as the UK's global gateway and largest economic contributor outside of London, home also to much of the country's key international infrastructure. The SELEP's Economic Recovery & Renewal Strategy (May 2021) guides its activities in the short to medium term and focuses on four strategic priorities that reflect the region's geography, assets and opportunities. These are underpinned by seven key objectives and four guiding principles that are summarised below.



DRIVING SUSTAINABLE ECONOMIC RENEWAL

OUR MEDIUM TO LONG-TERM RESPONSE TO
ECONOMIC RECOVERY

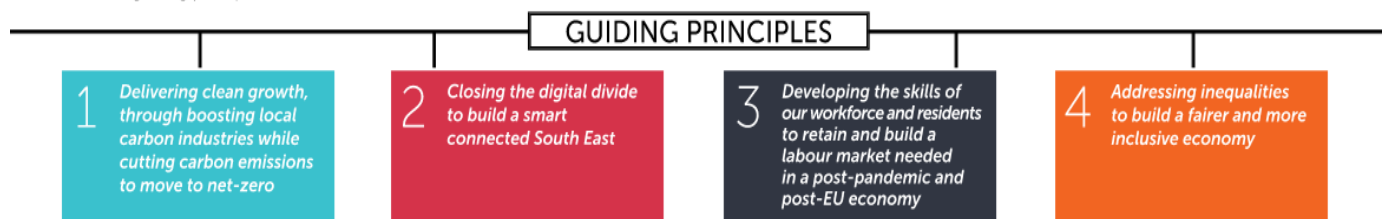
Our medium to longer term aims focus on four strategic priorities which reflect our unique geography, assets and opportunities:



These are underpinned by seven key objectives, which are to:



And four guiding principles:



WORKING TOGETHER FOR A FASTER, SMARTER AND MORE SUSTAINABLE ECONOMIC RECOVERY

3.1.2 The Coastal Catalyst priority is of particular relevance to Wealden in seeking to support the recovery, adaptation and growth of the visitor economy and also addresses the impacts of poorer physical connectivity on coastal and rural economies. Programmes that have been developed to do this include:

- Rebuilding Confidence & Demand in the Visitor Economy and Revi-VE⁷ grants focused on helping businesses impacted by the pandemic and supporting the visitor economy;
- Gourmet Garden Trails – a Discover England Fund project that initially targeted Germany and The Netherlands and was piloted in the South East by Kent and Essex, but which was later extended to target the domestic market and to include East Sussex. It focused on packaging bookable accommodation, wine and brewery tours, visits to English gardens, local produce, dining and local landscapes, integrated with the TXGB (Tourism Exchange GB) booking platform;
- Working with Transport South East and Sustrans to improve walking and cycling routes. Projects that tie in with this include the Eastbourne and South Wealden Walking & Cycling LTSF (Local Sustainable Transport Fund) package to support the development of the strategic growth area. In Wealden, this focuses on walking & cycling improvements along and linked into the Cuckoo Trail between Hailsham and Polegate.

3.1.3 At a **Sussex** level, a recent study by Blue Sail (Sussex Visitor Economy Study, 2021) has laid the foundations for greater pan-Sussex joint working with East Sussex, West Sussex and Brighton & Hove having now formed a tourism group. One of its key messages is about a 'new normal', 'where greener and more mindful priorities work harmoniously alongside economic growth' – sustainable growth based on natural assets, encouraging shorter journeys, longer stays and higher spend. The study identifies a market focus on:

- Country-Loving Traditionalists – empty nester wanting quality, food and drink, cultural experiences;
- Free & Easy Mini-Breakers – younger without children, wanting cultural experiences and activities;
- Explorers – nature lovers who like local culture, relaxation, outdoor leisure and being off the beaten track;

⁷ A SELEP funded grant scheme for the visitor economy to help deliver longer-term resilience and adaptation post-Covid-19.

- Buzzseekers – younger, free-spirited, looking for new experiences, local food & drink, 'wow' moments and non-serviced accommodation.

3.1.4 They recommend some 'Grand Projects' and some 'underpinning actions'; essentially it is all about experiences:

- Grand Projects include:
 - Camino Sussex/Off the Beaten track, focusing on joining up broken links in trails and along the coast and water;
 - Sussex Events – leveraging the impact of signature events to be longer with greater reach and impact;
 - A Year of.....- a 10 year plan of themed initiatives around development, marketing and partnership – examples are food & wine, gardens, culture, coast, well-being, walking & cycling.
- Underpinning actions are common opportunities to be challenged together, including:
 - Stay Sussex - to grow a high spending market – with a focus on creating more distinctive accommodation in rural and urban areas that is sustainably designed. It could align to other themes (e.g. well-being, food & drink, walking & cycling). Improved planning policies are an identified need along with identifying sites and working with private sector investors.
 - Sustainable Sussex – initiatives to support sustainable tourism development through action on local sourcing of supplies, recycling, energy and water conservation, and habitat improvement.
 - Research & Insight – the commissioning of informed intelligence to underpin action (e.g. hotel performance studies, economic impact, visitor surveys etc.).

3.1.5 Also at Sussex level, Sussex Modern – a cultural collection of art, landscape and wine – is leading a wine tourism initiative, with ambitions for Sussex tourism to develop around wine and culture. Together with the South Downs National Park, Plumpton College and Lewes District Council, they have secured £719,000 of Community Renewal funding to grow the area's sustainable tourism infrastructure in terms of sustainable transport, wine and cultural tourism, and to position Sussex as a world class wine destination to compete with the likes of Napa Valley. The project will deliver bookable art and wine itineraries, support business development in the hospitality sector and

pilot sustainable transport. Net zero tourism is an important part of this, with the SDNP seeking to develop as an exemplar in sustainable tourism.

3.1.6 Consultations with other Wealden partners in the wider region also highlighted:

- The 1066 Country Walk starting at Pevensey Castle and taking in Herstmonceux and much of the High Weald AONB – a 31 mile walk from Pevensey to Rye (in Rother) with recent improvements funded through EAFRD (European Agricultural Fund for Rural Development), peppered with wooden sculptures inspired by the Bayeux Tapestry and the heritage of 1066 Country. The wider 1066 Country Pathways Project is looking to tie in rural eateries and accommodation through initiatives like the Puddings and Pathways Festival;
- The potential for Astro-tourism with International Dark Skies Reserve status having been awarded to South Downs National Park and Birling Gap designated as a Dark Skies Discovery site. This also ties into the Observatory at Herstmonceux Castle and linked programme of activities;
- A health and wellness focus being promoted and developed through the Sussex Heritage Coast who are currently preparing a new joint strategy and action plan that will focus on health, well-being and heritage management;
- An Art Rooms pilot developed as part of England's Creative Coast, that tested artists hosting B&B and providing additional creative experiences, piloted initially with VisitKent, but with potential for extension into Sussex.

Wealden Policy Action & Opportunity

3.1.7 The **Wealden Corporate Plan 2023-2027** articulates the Council's four most important aims to achieve that includes the following:

Engaged Communities

- All the communities of Wealden should be supported and involved in decisions about their area and how our services are delivered. We want our communities to be safe and active and be able to lead fulfilling and worthwhile lives.

Sustainable Environment

- A sustainable environment is critical for us in delivering for all the communities of Wealden. We want an environment that is not only protected but also enhanced. We will play our part in the wider countries commitment to being net-zero carbon in tackling climate change.

Thriving Economy

- We need our local economy to be vibrant and diverse. This will ensure business and employment opportunities for all making Wealden an attractive place to live and visit.

Ambitious Council

- To be able to deliver on our commitments around engaged communities, a sustainable environment and a thriving economy and we need to be an ambitious organisation that is transparent and accountable. We will strive to continue to be dynamic and forward thinking in everything we do.

3.1.8 Of particular relevance to the visitor economy is the support for the tourism sector in achieving an thriving economy, but other ambitions are also of relevance including: protecting the area's natural environment and heritage that are the backcloth of the visitor offer; identifying income-generating opportunities for the Council; and the prioritisation of carbon neutrality and sustainable development, which can also be reflected in the visitor economy offer. It is noted that in the first year of the plan, the Council is investing £2 million in the local economy, including rural businesses and the tourism sector.

3.1.9 Research in support of a **Wealden Destination Management Strategy** (2017) identified Wealden's USP as an affordable, high quality, boutique destination with the offer focusing around the personal, the rural, the quirky and the niche. Escape, peace, tranquillity and participation in outdoor activities are all integral to the offer, as well as quality and sustainability. The strategic objectives for 2017-2019 were:

- Conserving the area's natural beauty;
- Raising awareness of the area in the market;
- Encouraging an increase in staying visitors especially off-peak;
- Encouraging an increase in visitor spend; and
- Exceeding expectations to promote returns and recommendations.

3.1.10 Key work themes for the Council and its partners were:

- Business engagement, networking and support for tourism businesses, including sharing product knowledge;

- Better data and its dissemination – including on accommodation performance – to inform decision-making (e.g. on planning applications and marketing activity);
- Product development and packaging to develop niche rural and coastal products, including green/sustainable tourism offers and products with accessibility, of accommodation and activities;
- Investigating the feasibility of an English Wine Tourism Festival, plus wine-based activities and packages including accommodation;
- Working to develop the area's identity and marketing, including closer working at Sussex level; and
- Development of sustainable transport ideas and projects.

3.1.11 Wealden's tourism market is primarily from London and the Southeast, plus some overseas tourism. In terms of visitor target markets:

- Primary target markets are:
 - Empty nesters – domestic short breaks and holidays for active post-family couples, family and friends; and
 - Day visitors.
- Secondary targets are:
 - Families and multi-generational families – domestic short breaks and holidays, interested in self-catering, camping and outdoor activities;
 - Niche special interest segments – walking, cycling, heritage, culture, photography, riding, golf, wellness, food, wine, dark skies; and
 - People with disabilities, a large and valuable market, requiring facilities that also serve older demographics generally.

3.1.12 The **Wealden Viticulture Feasibility Study** (2018) identifies wine as a fast-growing agricultural product. Wealden had 26 vineyards in all at the time of the study, but two that dominate, Rathfinney and Bluebell, which offer significant tourism potential. This market is expected to grow and in response, the sector and its partnerships are developing trails, tastings, tours and in some cases accommodation. Wine-related tourism has the potential to contribute to strengthening the area as a tourism destination which appeals to a variety of markets. The potential is Sussex-wide, and the bigger opportunity is for Sussex to be recognised as a quality destination for premier food and wine products and experiences in both domestic and international markets. The report recommends action should focus on building awareness through high profile events; building capability and capacity through collaboration; and to

build the market through developing quality packages and itineraries with accommodation to cater for short breaks and multi-destination markets.

3.1.13 The **economic impact of tourism** on Wealden (2019)⁸ is measured through volume and value research undertaken by TSE Research using the Cambridge Tourism Economic Impact Model. Pre-pandemic tourism volume and value estimates were:

- 0.47m overnight trips (73% by domestic visitors and 27% by overseas visitors) and 0.97m bednights, generating spend of £87.8m. 63% of nights were spent staying with friends and relatives, 13% in non-serviced accommodation and 4% in serviced accommodation. 67% of trips were for holiday purposes, 29% to visit friends and relatives, 3% were for other purposes and only 1% of overnight trips were for business purposes.
- 5.5m day visits and £214m of spending.
- Employment created by this spending is estimated at 6,219 Full Time Equivalent (FTE) jobs, and 8,743 actual jobs.

3.1.14 The data demonstrates very clearly the significantly higher levels of spend and increased economic impact of staying visits compared to day visits, and the role of market mix to consider as part of any future tourism strategy. This is embedded in the Wealden District Council economic development strategy and has been supported by significant activity by the tourism team with the adoption of new branding, the Explore Wealden website, and other initiatives to grow the value of the sector.

3.2 National Market Trends & Influences

3.2.1 The **Covid-19** pandemic crisis has had a major impact on the hospitality and tourism sectors over the past two years, with many businesses being forced to close for prolonged periods. Restrictions on travel overseas has meant that there has been a boom in the staycation market, and many businesses have traded strongly once they were allowed to reopen. This has not been universal though, with businesses in rural areas, coastal locations and smaller towns performing more strongly than those in large cities. With the corporate market slow to return and with new patterns of working from home it has been the leisure-led destinations that have benefitted the most. Industry commentators were forecasting a return to pre-pandemic levels of trading by 2023/24, but some are extending this to 2024/25 given the additional sector

⁸ Given the impacts of the Covid-19 pandemic on the sector this is the latest data available for normal market conditions and the accepted industry baseline.

challenges of high levels of debt, staff and skill shortages, and soaring energy prices all impacting the way they need to operate and their profitability.

3.2.2 Even pre-Covid-19, there was evidence of some key trends in the market that visitor economy businesses need to be aware of; indeed, a number of these trends have been accelerated by the pandemic and its associated impacts and are now here to stay in a changed landscape for visitor economy businesses to operate within. These include:

- **A staycation boom**, a Covid-19 fall-out given restrictions and uncertainties around overseas travel, but a market forecast to continue to drive tourism demand in the UK in the foreseeable future;
- **An ageing population**, with Boomers retiring and over 55s representing 39% of all private travel, they are a valuable demographic who are keen to keep body and mind stimulated;
- **The Generation Y / Millennials market is growing** - people born in the 1980s and 1990s are now starting to travel independently from their parents, looking for different experiences, distinctive design and a 'wow' factor, a relaxed atmosphere and flexible spaces for socialising, a high level of technology and connectivity, and a choice of experiences and activities;
- **Multi-generational travel** - family and friends groups of different shapes are increasingly prevalent. The Covid-19 pandemic is particularly driving demand for large groups and multi-unit accommodation;
- **Wellness** - a fast-growing element of global travel, whether integrating wellness into a mainstream break, or taking a wellness-dominated break, with a particular focus on escaping into nature and enjoying sensory experiences (yoga retreats, forest-bathing, meditation);
- **Authenticity and the pursuit of the real** – connection and emotional links with place and people, seeking experiences combining fun, learning, self-improvement and well-being; this group is keen to share via social media and in sharing provide a source of marketing for tourism industries including accommodation;
- **Maximising behaviour** – visitors are keen to cram in as much as they can into a short time, so a range of 'easy to book' quality experiences is needed across the day and evening, presented to inspire;
- **Sustainable and green travel** – visitors are keen to travel responsibly, understand where their food is sourced and how providers manage scarce resources;

- **Technology trends** - with social media increasingly prominent and the public driving content creation; destinations similarly have to market themselves visually, such as through video. Technology is also helping manage health risks on the move, check-in, reservations and touch-free payments;
- **Flexible booking policies and last minute bookings** – both a function of Covid-19 pandemic impacts but requiring mechanisms for response in order to secure bookings;
- **Ooo travel – the Workation** – out of office working presents the opportunity to work from a holiday location, so Wi-Fi and connectivity is now really important;
- **Budget vs extravagance** – both ends of the scale are seeking travel experiences, whether they have experienced hardship during the Covid-19 pandemic or have not been able to spend, so value and high-end experiences are both in demand;
- **Outdoor activity** – cycling in particular grew significantly during lockdown, with Department for Transport (DfT) estimating 200% growth; walking has also boomed, both trends linked to a desire for wellness and to experience the outdoors;
- **Dog ownership** has increased hugely during the covid-19 pandemic – more than one-third of UK households have become pet owners since the first lockdown in March 2020 - fuelling demand for dog-friendly holidays and accommodation;
- **Touring caravan and motorhome ownership** is steadily increasing, and Caravan & Motorhome Club and Camping and Caravanning Club membership is growing. More and more people are getting into caravan and motorhome holidays and breaks;
- **Camping has a cooler image** - tents are much easier and quicker to erect, and camping equipment is cheaper and more widely available. Demand for camping holidays has increased;
- **Disabled travellers** are looking to travel in growing numbers, seeking accommodation that is well adapted to their needs.

3.3 National Accommodation Product Development Trends

3.3.1 Against this backdrop of a changing tourism market, there have been a number of changes to hotel and visitor accommodation development in rural areas that it is useful to understand for this study, as these offers provide part of the wider competitor set within which Wealden's accommodation offer operates. Major hotel projects that were planned before the Covid-19 pandemic have been progressed for 2021 and

2022 openings. The current staycation boom is fuelling strong interest in the development of holiday resorts, holiday lodge parks and glamping, as developers, operators and landowners seek to capitalise on the surge in demand for UK holidays and breaks. Key hotel and visitor accommodation development innovations are responding to market interest in countryside escapes, eco-friendly holidays, experiential breaks, health and wellness and renewed interest in the outdoors, leading to:

- The development of different resort offerings that provide a choice of accommodation, alongside on-site eating and drinking options, leisure activities and guest experiences;
- Continuing investment in luxury spas and other wellness facilities and experiences;
- The development of contemporary, relaxed 'lifestyle' accommodation offers;
- Emerging new zero carbon eco-accommodation offers;
- The opening of luxury and boutique country house hotels;
- The emergence of 'deconstructed' hotels with guest bedrooms spread across an estate, supported by a central restaurant, bar, spa and leisure complex;
- The development of hotels and/or golf lodges on golf courses;
- Outdoor activity centres adding accommodation (e.g. fishing lakes adding fishing lodges, watersports centres adding holiday lodges, touring caravan and camping sites and/or hotel accommodation);
- The continuing development of boutique inn and pub accommodation in rural villages;
- The development of wedding resorts with on-site accommodation, indoor and outdoor ceremony spaces and function facilities;
- Continued interest in the conversion of redundant farm buildings to self-catering holiday accommodation;
- The continuing development of holiday lodge parks, in many cases with central restaurant and leisure facilities;
- The development of eco lodge parks with zero-carbon, off-grid accommodation units;
- The emergence of 'lifestyle' resorts as a product, offering relaxed, contemporary guest accommodation, on-site dining options, spa and leisure facilities, and a choice of on-site guest experiences (e.g. yoga classes, craft workshops, bushcraft courses, cookery classes, art classes etc.);
- The upgrading of touring caravan and camping sites;
- The continuing growth of glamping;

- The emergence of glamping resorts, offering a choice of glamping units and on-site guest experiences;
- Increasing the number of treehouses;
- The development of further spa and wellness retreats.

3.3.2 Whilst coastal locations are limited in Wealden, and constrained in terms of development opportunity by flooding, we note the following product development trends in coastal locations of relevance to Wealden and its neighbouring coastline:

- The demolition of former hotels and replacement with new modern branded hotels, sometimes alongside residential apartment buildings;
- The partial conversion of hotels to residential apartments to allow re-investment in the remaining hotel;
- Proposed hotels on existing or planned holiday resorts;
- The upgrading of coaching hotels;
- The opening of restaurants with rooms in coastal settings;
- The opening of boutique self-catering accommodation in coastal locations;
- The development of beach huts and lodges;
- The upgrading, development and expansion of holiday parks with the introduction of new, high quality caravan holiday homes and lodges; additional holiday home pitches; and investment in restaurant, bar, entertainment and leisure facilities;
- The development of holiday resorts offering luxury lodges, glamping and hotel accommodation, alongside a wide range of on-site food and beverage, entertainment, leisure and outdoor activity facilities;

3.4 Key Messages

3.4.1 Tourism is an important part of the wider economy, and its growth and development are supported at a strategic level by the LEP, the county and Wealden District Council itself. There are a number of emerging themes coming out of the strategy, policy and projects review for accommodation development to support further and link into. These include:

- Walking;
- Cycling;
- Wine tourism;

- Culture;
- Eco tourism/sustainability;
- Wellness;
- Dark skies;
- Art; and
- Heritage.

3.4.2 Market and product development trends, many of which have been accelerated by Covid-19, are presenting all sorts of opportunities to attract new markets and diversify the area's product offer with something more innovative and experiential. This also presents opportunities to reduce seasonality through broadening market appeal. Within rural and coastal destinations, the leisure-led markets are leading the way in post-Covid recovery and Wealden District is in a good position to capitalise on these trends.

3.4.3 There is a distinct sustainability thread to Wealden District Council's vision, corporate plan and net zero carbon ambitions, which chimes well with where the market is moving. The visitor economy can contribute to the Council's sustainability aims through the development of sustainable tourism and the delivery of new and innovative accommodation products with strong eco credentials in both their design and operation, whilst also helping to broaden market appeal.

4. WEALDEN VISITOR ACCOMMODATION SUPPLY & PERFORMANCE OVERVIEW

4.1 Audit Highlights

4.1.1 The audit identified a total of 340 accommodation establishments in Wealden District with 309 of these in the Wealden planning area (which excludes the South Downs National Park part of Wealden District).

- In the district, the audited accommodation accounts for 11,801 bedspaces. Serviced accommodation accounts for 17% of this, with non-serviced accommodation accounting for the remaining 83%.
- In the Wealden planning area, there are 11,040 bedspaces overall. Serviced accommodation accounts for 16% of these and non-serviced accommodation accounts for the remaining 84%.

4.1.2 Touring caravan and camping sites dominate bedspace provision with 40% of the total in both the wider Wealden District and the Wealden Planning Area. Holiday parks and other accommodation both account for 16% each, the latter including some large scout and group accommodation (including hostels). Hotels account for 12% (Wealden planning area)/13% (all district). Self-catering accommodation is the next largest provider at 10%, with pub accommodation, guest houses/B&Bs at 2% each and glamping at only 1%. More detail is presented in the summary tables below.

Table 3

WEALDEN DISTRICT VISITOR ACCOMMODATION SUPPLY (including SDNP)

WEALDEN DISTRICT (including SDNP) – Overview Breakdown of Accommodation Type			
Category	Total establishments	Total rooms/units	Total bedspaces
Hotels	19	733	1,466
Pub accommodation	18	118	231
Guest Houses/B&B	40	123	257
Self-Catering	175	319	1,193
Touring sites	43	1,380	4,767
Holiday Parks/Lodges	12	533	1,882
Glamping	16	42	168
Other accommodation	17		1,837
Total	340	3,248	11,801

Table 4
WEALDEN VISITOR ACCOMMODATION SUPPLY (excluding SDNP)

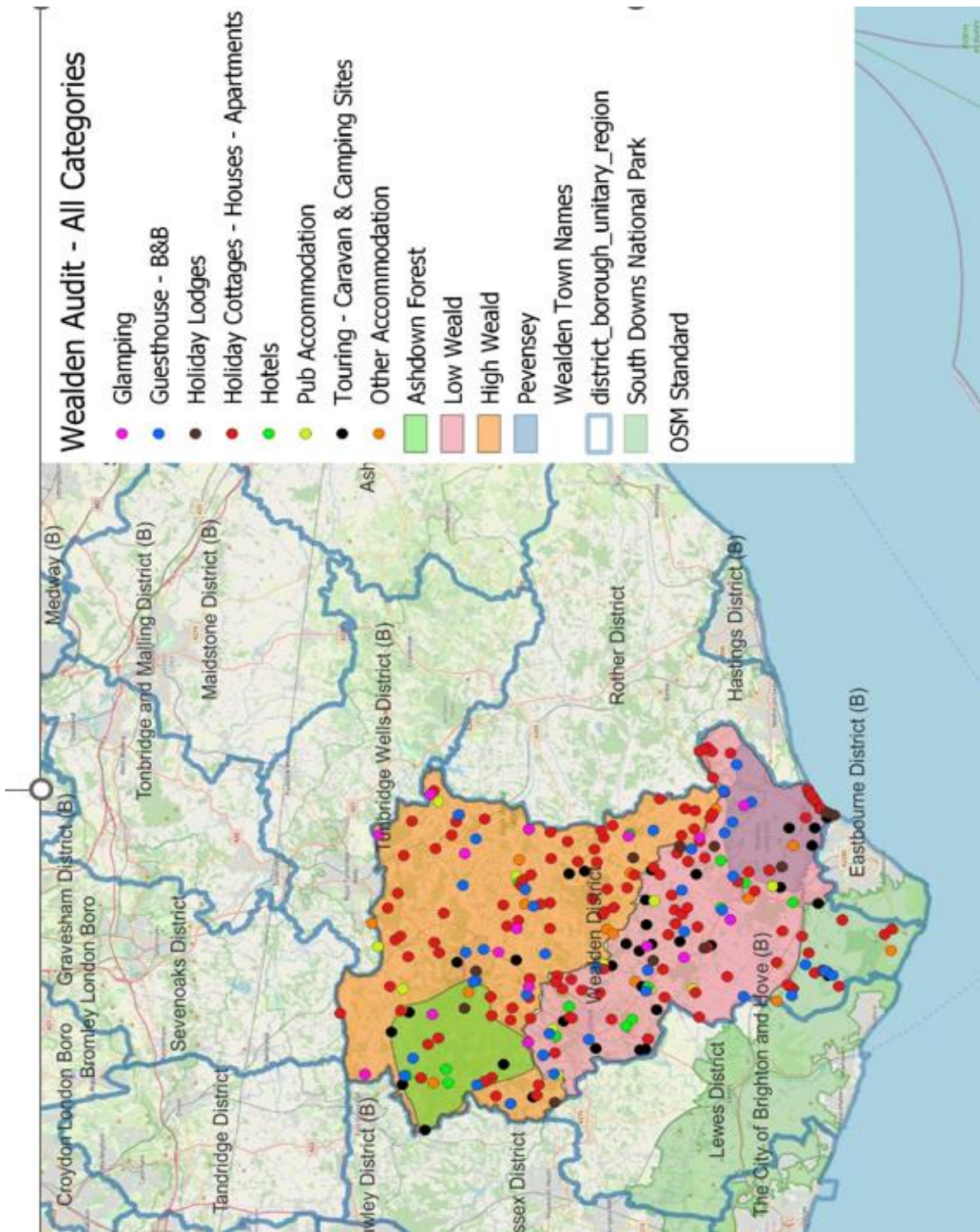
WEALDEN PLANNING AREA (excluding SDNP) – Overview Breakdown of Accommodation Type			
Category	Total establishments	Total rooms/units	Total bedspaces
Hotels	16	651	1,302
Pub accommodation	15	105	205
Guest Houses/B&B	36	106	223
Self-Catering	159	277	1,056
Touring sites	41	1,281	4,416
Holiday Parks/Lodges	11	533	1,880
Glamping	16	42	168
Other accommodation	15		1,790
Total	309	2995	11,040

4.1.3 The distribution of accommodation geographically can be seen in the map and table below/overleaf. The geographical breakdowns represent landscape character areas that are also recognised in tourism terms as drivers to demand and were used in the previous 2009 study for Wealden District. These show that Low Weald dominates the supply in terms of bedspaces, followed by Pevensey Bay area. The High Weald has a high percentage of establishments but lower bedspaces, indicating smaller establishments. Holiday parks, caravan and camping and group accommodation boost bedspace numbers in the Low Weald and Pevensey Bay areas.

Table 5
BREAKDOWN OF WEALDEN VISITOR ACCOMMODATION BY AREA

WEALDEN BREAKDOWN OF ACCOMMODATION BY AREA		
	%	
	Establishments	Bedspaces
Ashdown Forest	7%	9%
High Weald	39%	16%
Low Weald	35%	41%
Pevensey Bay	10%	26%
South Downs	9%	8%

Figure 6
DISTRIBUTION OF WEALDEN VISITOR ACCOMMODATION



4.1.4 The table below summarises supply by area and type of accommodation for the district.

Table 6

WEALDEN VISITOR ACCOMMODATION SUPPLY BY AREA AND TYPE

Category	ASHDOWN FOREST			HIGH WEALD			LOW WEALD			PEVENSEY			SOUTH DOWNS			TOTALS		
	Establishments	Rooms	Bedspace	Establishments	Rooms	Bedspace	Establishments	Rooms	Bedspace	Establishments	Rooms	Bedspace	Establishments	Rooms	Bedspace	Establishments	Rooms	Bedspace
Hotels	4	178	356	2	12	24	8	436	872	2	25	50	3	82	164	19	733	1466
Pub Accommodation	2	10	20	6	49	99	7	46	86				3	13	26	18	118	231
Guesthouse/B&Bs	4	11	22	15	28	64	13	40	78	4	106	223	4	17	257	40	123	257
TOTAL SERVICED	10	199	398	23	89	187	28	522	1036	6	131	273	10	112	447	77	974	1954
Self-catering	7	9	24	81	128	487	55	102	383	16	38	162	16	42	137	175	319	1193
Touring/Campsites	4	110	366	8	188	164	25	756	2670	4	227	766	2	99	351	43	1380	4767
Holiday Lodge and Park				3	4	19	3	31	122	5	497	1739	1	1	2	12	533	1882
Glamping	1	1	2	11	29	116	3	4	18	1	8	32				16	42	168
TOTAL NON-SERVICED	12	120	392	103	349	786	86	893	3193	26	770	2699	19	142	490	246	2274	8010
Group/Hostel	1		12	6		102	2		360				1		27	10		501
Retreat													1		20	1		20
Riding Centre	1		4													1		4
Scouts	1		235	1	1	750	1		220							3		1205
Wedding Venues							1		27	1		80				2		107
TOTAL OTHER	3	0	251	7	1	852	4	0	607	1	0	80	2	0	47	17	0	1837
TOTAL WEALDEN	25	319	1041	133	429	1825	118	1415	4836	33	901	3052	31	254	984	340	3248	11801
% OF WEALDEN	7		9%	39%		16%	35%		41%	10%		26%	9%		8%			

- 4.1.5 Other characteristics of provision to draw out of the audit at the district level include pet friendly establishments, wheelchair access friendly establishments, distinctive accommodation (of unusual character or form) and Airbnb. This is discussed in order below.

Pet Friendly

- 4.1.6 The trends research has identified a booming market for pet friendly accommodation given the surge in pet ownership that accompanied the Covid-19 lockdown. The audit identified 105 properties advertising themselves as pet friendly – that's 31% of all establishments across the district.

Table 7
WEALDEN PET-FRIENDLY VISITOR ACCOMMODATION

Category	No. of Establishments
Glamping	3
Guesthouse/B&B	6
Holiday Park/Lodges	1
Hotel	10
Pub Accommodation	13
Self -catering	38
Touring Caravan & Camping Sites	32
Other accommodation	2
Total	105

Access Friendly

- 4.1.7 Only 10 out of 340 properties are advertised as being wheelchair access friendly (it is not known whether they are accredited as such), which is a missed opportunity given the significant size of this market and their family and friends, plus the potential for these facilities to serve a growing aging population as well as providing for equality of opportunity.

Table 8
WEALDEN ACCESS FRIENDLY VISITOR ACCOMMODATION

Category	No. of Establishments
Hotel	8
Glamping	1
Other	1

Total	10
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Supercottages

4.1.8 The trend for large group gatherings and multi-generational family and friends trips was identified in the trends research as a growing market. The audit only identified 3 properties that could fall into this category in terms of one large property. These are:

- Marck House – capacity 22 bedspaces
- Pokes Manor – capacity 20 bedspaces
- Green Loaning Country House – capacity 16 bedspaces

In addition, some complexes of units could meet this need, albeit not under one roof - but these are also in limited supply. Examples Include:

- Nutley Edges cottages (15 units/62 bedspaces)
- Glyndley Manor Cottage Estate (16 units/84 bedspaces)
- Beechcroft Cottages (4 units/177 bedspaces)
- Rathfinney Estate (10 units/23 bedspaces – South Downs National Park)
- Beachy Head Holiday Cottages (8 units/38 bedspaces – South Downs National Park)

AirBnb

4.1.9 The audit recorded properties being advertised on AirBnb, which totalled 81 whole home properties. The vast majority of these are available all year round – only 9 were seasonal. All of these properties were also being distributed through other booking platforms.

4.2 Changes in Supply

4.2.1 As part of this study we have considered a comparison and trend analysis to show how Wealden's visitor accommodation has changed over time. This is not an easy task because audits have been done differently over time. We have for example found anomalies relating to properties in previous audits not being located within the district, some with significant capacity, that can distort apparent 'trends'. Properties have also moved between categories of accommodation as they have been re-positioned or expanded (e.g. between hotel and pub, caravan and camping and

holiday park). Also, post-Covid-19, we have identified quite a lot of properties as closed or where it is uncertain if they are open, temporarily or permanently.

4.2.2 However, we can draw some bigger messages out of comparing these findings with those of the 2009 Hotel Solutions report completed for Wealden, which points to a direction of travel as opposed to more granular analysis. In the table overleaf, we summarise the previous audit figures and compare those figures with the latest 2022 audit. The outcome of the analysis provides the following key messages:

- At a district level, the supply of accommodation has increased significantly, from 259 establishments and 8,540 bedspaces in 2009 to 340 establishments and 11,801 bedspaces in 2022 – an increase of around 38% in supply (including SDNP part of the district).
- Hotel capacity has increased; this can be accounted for by some new provision such as the Premier Inn at Uckfield, plus some pubs re-positioning in the hotel market. There have also been some losses such as the Best Beech Inn at Wadhurst. This is described in greater detail at section 5 of this report.
- Pub accommodation numbers have dropped. Some have reclassified as hotels but there have been a number of closures, or pubs that are still open but no longer letting rooms.
- Guest house and B&B provision has dropped back significantly – from 76 to 40 establishments - but this is a fluid sector with operators readily moving in and out of the segment. New budget hotels have also taken some of this market.
- The self-catering segment has grown significantly from 107 units and 417 bedspaces in 2009 to 175 units and 1,193 bedspaces in 2022.
- Touring caravan and camping sites continue to dominate the mix of supply in 2022 but have also increased from 27 in 2009 to 43 establishments now and an additional c. 1000 bedspaces.
- Lastly, a new category of accommodation has been introduced since 2009, named glamping, which now has 16 establishments and 168 bedspaces.

Table 9

WEALDEN VISITOR ACCOMMODATION COMPARISON 2009-2022

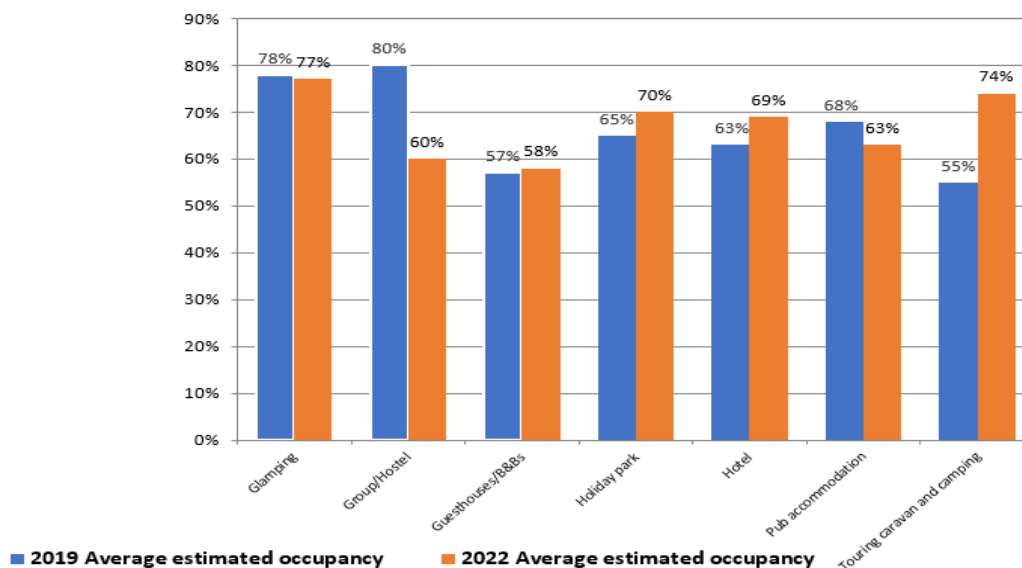
Category	Total Establishments		Total Rooms/ Units		Total Bedspaces	
	2009	2022	2009	2022	2009	2022
Hotels	17	19	387	733	1174	1466
Pub Accommodation	28	18	189	118	378	231
Guest Houses/B&B	76	40	204	123	408	257
Self-Catering	107	175	139	319	417	1193
Touring Sites	27	43	1070	1380	3745	4767
Holiday Parks/Lodges	9	12	691	533	2418	1882
Glamping	0	16	0	42	0	168
Other ⁹	0	17	0	0	0	1837
Total	264	340	2680	3248	8540	11801

4.3 Performance Overview

4.3.1 The CATI (Computer Aided Telephone Survey) survey indicated the following levels of occupancy in Wealden's visitor accommodation, set out by category of accommodation in the graphic below. This shows levels of performance in 2019 (retrospective and forecast performance in 2022).

Figure 7

Indicative occupancy levels 2019 and estimated 2022



⁹ Group and youth accommodation.

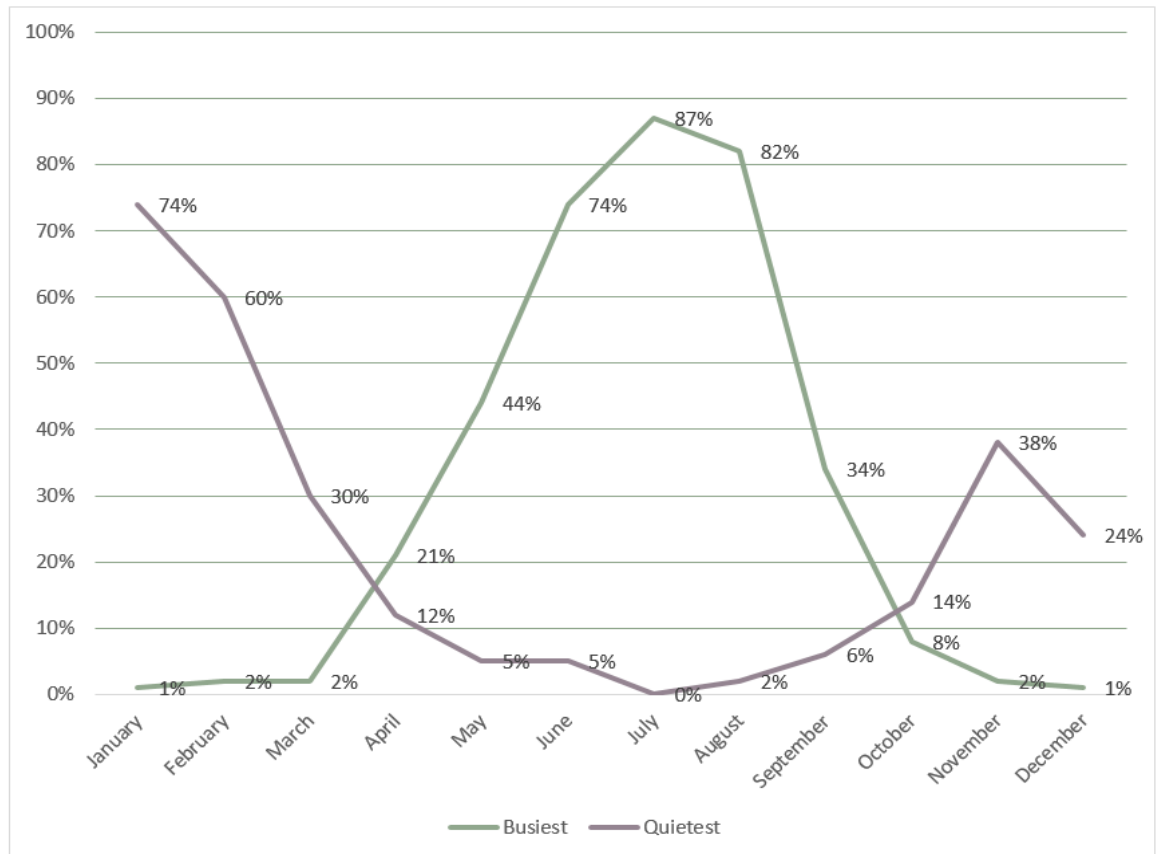
4.3.2 These are healthy levels of occupancy overall. Touring caravan and camping has seen a particularly healthy bounce back from Covid-19, as has glamping, reflecting trends in the market for the outdoors and this type of rural accommodation. However, respondents fed back that challenges ahead are anticipated due to an increase in costs (29%), market confidence (29%), and increased debt (15%).

4.3.3 Other findings relating to market performance from the CATI survey were:

- Key markets in order of priority were identified as:
 - Couples;
 - Families;
 - Multi-generational families and groups; and
 - Overseas visitors.
- The survey confirmed a seasonal market, as depicted in the graphic below:

Figure 8

WEALDEN VISITOR ACCOMMODATION MONTHLY OCCUPANCY



Base: 84

- The main reasons for visiting Wealden as provided by respondents during the survey in order of importance were:
 - Short break/get away for a night or two;
 - Visitors coming for a few days walking;
 - Business visitors;
 - Visitors coming to undertake outdoor activities;
 - People attending weddings and family parties; and
 - Events and festivals – those mentioned most frequently were Glynbourne, Love Supreme Jazz Festival, Herstmonceux and the tennis at Eastbourne.

4.3.4 In addition to the CATI survey, as part of the research, we have accessed holiday rental data through the AirDNA analytics platform, which is the leading source of short-term rentals data in the world. AirDNA obtains its data through two main sources – legally scraped data from **Airbnb and VRBO** and partner data from channel managers, property managers and individual property hosts who list their properties online. AirDNA's supply data has been proven to be 97.5% accurate through testing by property company named Coldwell Banker Richard Ellis (CBRE) and 96.3% accurate for revenue and bookings earned. The data for Wealden District was taken from the wider subset of East Sussex within the AirDNA data source. Key findings included:

- With regards to overall inventory and the impact of Covid-19, AirDNA report that there has been an **11% growth in the number of accommodation units** (specifically non-serviced) from May 2019 until May 2022.
- The AirDNA data shows that properties during the months of **July and August 2022 were 94% occupied.**
- The average lead in times (time in days between making a booking and the date of arrival) for bookings over the past 12 months in the area remains strong at **140 days**, maintaining a long-term demand in the current market which is typically seeing shorter lead in times.
- The Average Daily Rate (ADR) for non-serviced accommodation reported by AirDNA has shown a **23.8% growth from 2019 to 2022** (from £105 up to £130 across the year). This was further broken down by the range of percentiles in 2019 being £59 (as the ADR 5th Percentile) and £483 (as the ADR 95th percentile) up to £69 (as the ADR 5th percentile) up to £737 (as the ADR 95th percentile). This detail shows the greater level of price growth of 52% at the higher end of the market (95th percentile) compared to 17% growth at the

lower end (5th percentile). The total revenue growth for non-serviced accommodation in this area has **grown by 33% from 2019 to 2022**.

- The overall occupancy growth for non-serviced accommodation in this area has **grown from an average occupancy of 68% in 2019 to 74% in 2022, or an 8.8% increase**. This is exactly in line with the findings from the CATI survey for non-serviced accommodation.
- The average length of stay from AirDNA data shows a propensity for shorter stays, with **74% of stays recorded for two nights or less**. This was split once more with 33% staying for one-night and 41% staying for two nights stays.
- The average size of accommodation in the data from AirDNA shows the majority of the accommodation is made up of smaller units with 65% of the accommodation stock having two bedrooms or less. This is further broken down with 39% of the AirDNA stock showing as one bedroom and 26% showing as having two bedrooms. The makeup is supported by the growth in bookings for one-bedroom properties, which has increased by 21% from 2019 to 2022, the largest growth in any property size. Of the non-serviced accommodation in the area in the AirDNA data, only 4% are listed as having a hot tub.

4.4 Gap Analysis

- 4.4.1 The audit has shown a good base of visitor accommodation in Wealden District, with 340 establishments and over 11,000 bedspaces. Whilst this is strongly skewed towards non-serviced accommodation, this is representative of the rural nature of the district and also the direction of the leisure market demand is moving towards. The distribution of accommodation is focused on the Low Weald; the Ashdown Forest and the SDNP areas have a smaller amount of provision, whilst arguably having the strongest visitor appeal.
- 4.4.2 With very high levels of performance being achieved in the peak months, additional visitor accommodation is likely to be needed in order to grow the staying visitor market and maximise the benefits that staying visitors bring, such as a higher spend. A focus on upscale products within the mix would also assist to boost this contribution.
- 4.4.3 In doing so, focusing on accommodation products that can attract a wide range of markets and visitors who can and will travel outside the peak season would also contribute to reducing seasonality. Destination accommodation offers would also help to generate new demand and need not rely on an element of local demand to make them viable. There remains a number of gaps in supply presented by emerging

trends in the market that Wealden could seek to fill. Examples that could help address the shortage of hotel accommodation include destination country house hotels and spas, lifestyle brands with a following and gastro pubs with boutique bedrooms. Non-serviced destination offers that would meet market need and fill gaps in supply include wellness retreats, luxury glamping products such as treehouses, and luxury eco lodge developments, which at scale could make significant economic impact.

5. WEALDEN SERVICED ACCOMMODATION

5.1 Hotels

Current Supply of Hotels

- 5.1.1. Our research has identified 19 hotels in Wealden with a total of 733 letting bedrooms and 1,466 bedspaces, 16 of which are within the Wealden planning area providing 651 letting bedrooms and 1,302 bedspaces.

Table 10
WEALDEN HOTEL SUPPLY 2022¹⁰

Location/TripAdvisor Rating	Excellent		Very good		Average		Poor		Not rated		Total	
	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds
Ashdown Forest			3	306			1	50			4	356
High Weald	2	24									2	24
Low Weald	4	412	3	370	1	90					8	872
Pevensy Bay	1	16	1	34							2	50
Total Hotels (Planning area)	7	452	7	710	1	90	1	50			16	1302
South Downs National Park	2	92	1	72							3	164
Total Hotels (Wealden District)	9	544	8	782	1	90	1	50	0	0	19	1,466

- 5.1.2 In terms of location and characteristics of supply, the following observations are made:

- The majority of hotel supply is in the Low Weald, with very limited supply in High Weald and the Pevensy Bay areas.
- There are no hotels in the market town centres of Crowborough, Uckfield, Hailsham, Polegate or Heathfield.
- The majority of supply is relatively small in scale, with an average size of 39 rooms; only two hotels have in excess of 100 bedrooms.
- The area includes some high-quality country house hotels including Ashdown Park, Buxted Park and Horsted Place. There is also a resort at the East Sussex National Golf Course (near Uckfield).
- Quality overall is good (excellent or very good on TripAdvisor), with one average score (Boship Lions) and one poor score (Chequers at Maresfield).

¹⁰ In the absence of one national tourism accommodation ratings scheme, it was decided to use the rating for properties on TripAdvisor, which is consistent across all accommodation types.

- There are 3 budget hotels located at Polegate, Hellingly and Uckfield, all of which are located along the A22.
- The remainder includes a mix of pubs, inns and restaurants with rooms.

Table 11

WEALDEN HOTEL SUPPLY 2022 – BREAKDOWN BY AREA AND ESTABLISHMENT

Hotel	Rooms	Bedspaces	Rating
Ashdown Forest			
Ashdown Park Hotel and Country Club	106	212	Very good
Brambletye Hotel	19	38	Very good
Roebuck by Greene King Inns	28	56	Very good
Chequers Inn Forest Row	25	50	Poor
Total:	178	356	
High Weald			
Middle House Hotel	4	8	Excellent
Stone House	8	16	Excellent
Total:	12	24	
Low Weald			
Buxted Park Country House Hotel	50	100	Excellent
Horsted Place	20	40	Excellent
Premier Inn Eastbourne (Polegate)	56	112	Excellent
Premier Inn Uckfield	80	160	Excellent
Buffalo Bill's (formerly The Forge)	23	46	Very good
East Sussex National Golf Resort & Spa	104	208	Very good
Travelodge Hellingly Eastbourne	58	116	Very good
Best Western Boship Farm Hotel	45	90	Average
Total:	436	872	
Pevensey Bay			
The Olde Forge Hotel & Restaurant	8	16	Excellent
The Crown Hotel	17	34	Very good
Total:	25	50	
Total Hotels (Planning area)	651	1302	
South Downs National Park			
The Star	30	60	Excellent
Wingrove House	16	32	Excellent
Deans Place Hotel	36	72	Very good
Total:	82	164	
Total Hotels (Wealden district)	733	1,466	

Rating source: TripAdvisor

5.1.3. In terms of changes in supply since the 2009 study we identified the following:

- Closures
 - Burswood Guest Rooms, Groombridge (30 rooms, 60 bedspaces)
 - Crossways Hotel, Polegate (8 rooms, 15 bedspaces)
 - Priors Court Hotel, Pevensey (5 rooms, 10 bedspaces)
 - Bay Hotel Pevensey, Pevensey Bay – applied for change of ground floor use, possibly retaining rooms but does not appear to be trading.
- Re-brandings

- The Halland Forge is now rebranded as a destination restaurant, Buffalo Bills.
 - The Boship Farm Hotel has joined the Best Western marketing consortium.
 - Corn Exchange, Hailsham has re-branded as The Crown.
- Additional supply
 - Premier Inn, Uckfield (60 rooms)
 - Premier Inn, Eastbourne (Polegate) expansion from 40 to 56 rooms
- Investment in the past 3 years
 - A £500k investment in Horsted Place, with new meeting rooms, bars and refurbishment.
 - A £250k investment at the East Sussex National including a new spa, balcony and refurbishment.
 - Boship Farm has refurbished 20 bedrooms.
 - The re-opening of The Star at Alfriston (in the SDNP) after major refurbishment by the famous Polizzi family.
- Potential investment (told by management) at existing hotels:
 - A £750k investment in a spa at Ashdown Park.
 - Proposals for an eco-staff accommodation block at the East Sussex National, plus possible lodge development.

Hotel Performance

5.1.4 Given the impact of the Covid-19 pandemic on trading performance, it has not been possible to collect 'normal trading' year data and trend data in the way we would have done so in the past. Hotels, as with the rest of the hospitality industry, are in recovery mode with an element of uncertainty around the market remaining, and some segments are quicker to recover than others. 2019 remains a benchmark year for the sector as the pre-pandemic 'norm' so businesses were asked about performance at that point, their aspirations for 2022, and comments on partial trading in 2020 and 2021. The following observations were made:

- The hotels in the Wealden supply are wide ranging in terms of their offer, pricing and markets. The range of performance to some degree reflects this, with smaller hotels typically averaging 45-55% occupancy in 2019, and larger more professionally run hotels averages in a range of 60-72%.
- Some luxury exclusive hotels choose to operate at lower occupancies (55-65%) and higher rates, whereas branded budget hotels focus on occupancy at lower rates, typically achieving occupancies of 75-80%.

- The achieved average rates¹¹ are a combination of occupancy and rate and were typically at c. £65-£75 as a hotel average in 2019, but for properties at the luxury end of the market these on average exceeded £150.
- Aspirations around occupancy for 2022 are closer to 65-70% as an average, with many targeting enhanced average daily rates over 2019, reflecting significant cost increases.

5.1.5 Wealden has a seasonal and predominantly leisure-led market, with peaks between June and August and the wider season concentrated between April and September each year. This is typical of rural districts. Weekend occupancies are high (60-80%+) with mid-week occupancies averaging between 35-65% depending upon the type of hotel. Key weekend markets are weddings, short breaks, golf breaks, events-driven business and visits to friends and relatives. Mid-week demand is made up of a mix of leisure and corporate/contractor demand, also including mid-week weddings, meetings and event demand.

5.1.6 Whilst the cloud of the Covid-19 pandemic and recovery continue, there is also rising energy costs and staffing shortages that are severely impacting the sector. However, there are underlying market trends that are positive for hotels in Wealden, and feedback was cautiously optimistic for the longer term. These include:

- Population growth should drive increased demand from the visits to friends and relative's market, as well as weddings and functions;
- Continued economic growth and expansion of employment areas should drive some growth in corporate demand;
- The significant construction and development projects underway and proposed will drive contractor and associated demand;
- Golf has seen something of a recovery in the past few years, which should continue to drive golf breaks demand;
- The gradual re-introduction of events and the return of the overseas market should also drive hotel demand.
- Residential conference demand has been slower to return but is beginning to show an upturn, which the major destination offer at East Sussex National should begin to benefit from.

5.1.7 Having said all of this, a recession if it materialises will cast a different perspective and push some of the identified demand from these drivers into the mid-term horizon.

¹¹ ADR (Average Daily Rate) or ARR (Average Room Rate) is a measure of the average rate paid for the rooms sold, calculated by dividing total room revenue by rooms sold.

Sector Development Potential

5.1.8 In terms of sector development potential over the Local Plan period, we identify that taking account of market trends, drivers to demand, intelligence from and aspirations of existing operators, and soft market testing, there is market potential for the development of:

- New destination hotels, country house hotels and spas, as well as the expansion and further development of existing high-quality hotels catering for weddings and leisure breaks as well as an element of corporate and meetings demand;
- The development of hotel accommodation linked to demand drivers such as attractions and wedding venues; and
- The further development of budget hotels, as extensions to existing sites but also potentially to include new budget hotels along key routes linked to business park developments and to serve the key market towns.

5.1.9 Soft market testing with hotel developers, investors and operators has generated some potential interest in new hotel development. The main weakness as perceived by hotel companies is the size of the key towns in Wealden – other than Premier Inn and Travelodge, most hotel brands look for a population of at least 80,000-100,000 to support a new build hotel, which is an indication of a critical mass of facilities and associated demand. The limited amount of corporate demand and the seasonality of the market are also constraints. Large centres outside of Wealden such as Tunbridge Wells and Eastbourne will tend to draw the major hotel brands because they can meet these criteria and can demonstrate established demand. Budget hotel developers/operators will look at lower population thresholds, but in these situations tend to want to locate outside of town centres to pick up additional transient demand. Destination hotels do not rely on demand generated more locally as they generate their own demand and are therefore better suited to a destination area such as Wealden, especially given its strong catchment to affluent markets.

5.1.10 Eleven national hotel developers, investors and operators were approached as part of the research to test their potential interest in developing or acquiring and redeveloping a hotel in Wealden. Responses were received from 10 of these, with 9 expressing interest. That interest included budget hotels, small boutique hotels, destination/country house hotels, luxury lifestyle hotels, plus mid-scale and upscale conversion brands.

5.1.11 In addition to external developer/operator interest, existing hotel operations are showing a desire to develop, expand and refurbish to meet changing market needs – Ashdown Park and East Sussex National are good examples of substantial businesses with potential to diversify their markets with the addition of facilities and potentially alternative forms of accommodation, such as lodges and glamping within their grounds. The Star at Alfriston (in the SDNP) is a good example of a hotel developer/operator taking over an existing hotel and re-positioning it to match emerging market needs, in this case to a very high standard destination offer.

5.2 Pub Accommodation

Current Pub Accommodation Supply

5.2.1 Our research has identified 18 inns and pubs offering accommodation in towns and villages in the district with a total of 118 letting bedrooms and 231 bedspaces. Within the Wealden planning area, this drops to 15 pub accommodation establishments, with 105 bedrooms and 205 bedspaces. This is shown in the table below:

Table 12
WEALDEN PUB ACCOMMODATION 2022

Location/TripAdvisor Rating	Excellent		Very good		Average		Poor		Not rated		Total	
	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds
Ashdown Forest	1	8							1	12	2	20
High Weald	1	19	5	80							6	99
Low Weald	1	16	5	62	1	8					7	86
Pevensey Bay												
Total Pub Accommodation (Planning area)	3	43	10	142	1	8			1	12	15	205
South Downs National Park			3	26							3	26
Total Pub Accommodation (Wealden District)	3	43	13	168	1	8			1	12	18	231

5.2.2 The supply of pub accommodation is concentrated in the Low Weald and the High Weald areas. There is no pub accommodation in Pevensey Bay. The majority of pubs have under 10 bedrooms with the average size across the district being 6 rooms. In terms of quality standards, three pubs stand out with excellent ratings (The Anchor, the Dorset Arms and the Buxted Inn), with the majority of the remaining supply rated very good on TripAdvisor. This is shown in the table overleaf.

Table 13

WEALDEN PUB ACCOMMODATION BY AREA AND ESTABLISHMENT 2022

Pub Accommodation	Rooms	Bedspaces	Rating
Ashdown Forest			
The Anchor Inn	4	8	Excellent
The Swan	6	12	Very good
Total:	10	20	
High Weald			
The Dorset Arms	9	19	Excellent
The Crown Inn	17	34	Very good
The Greyhound Inn	5	10	Very good
The Griffin Inn	13	26	Very good
The Old Vine Inn	3	6	Very good
The Rose and Crown	2	4	Very good
Total:	49	99	
Low Weald			
The Buxted Inn	8	16	Excellent
Blackboys Inn	5	10	Very good
The Berwick Inn	2	4	Very good
The Blacksmiths Arms	6	12	Very good
The Chequers Inn	17	28	Very good
The Roebuck Inn	4	8	Very good
The May Garland Inn	4	8	Average
Total:	46	86	
Total Pub Accommodation (Planning area)	105	205	
South Downs National Park			
The George Inn	5	10	Very good
Tiger Inn	5	10	Very good
Ye Olde Smugglers Inn	3	6	Very good
Total:	13	26	
Total Pub Accommodation (Wealden District)	118	231	

5.2.3 In terms of recent and proposed changes in pub accommodation supply, the research has identified the following:

- Closures
 - Plough & Horses, Crowborough (15 rooms)
 - Horseshoe Inn, Herstmonceux (20 rooms)
 - The Giants Rest, Wilmington (2 rooms)
 - Best Beech Inn, Wadhurst (6 rooms)
 - Hay Waggon, Hartfield (no information on rooms)
- Re-brandings
 - The Black Lion at Halland is now the Blacksmiths Arms
 - The Horam Inn is now the May Garland Inn
 - The Corn Exchange at Hailsham has re-branded as The Crown
- Recent investment

- The Swan at Forest Row had a complete refurbishment of its 6 bedrooms
- The addition of 12 bedrooms at The Crown, Hailsham
- Proposed investment
 - The Swan at Forest Row is considering developing pods to provide additional accommodation in its grounds.
 - Ye Olde Smugglers Inn (Alfriston in the SDNP) expressed interest in expansion through the CATI survey.

Pub Accommodation Performance

5.2.4 There is some variability around the performance of pub accommodation, which reflects to some degree the varying standards and professionalism of management and marketing, and the degree to which the pub focuses on rooms business compared to food and drink. However, those reporting their occupancies as part of our research averaged a healthy 69% in 2019, which is the benchmark figure pre-pandemic and were forecasting an average 72% occupancy for 2022. Those that have positioned themselves as providing high quality guest accommodation are in some cases achieving in excess of this (c. 80%), whereas there was one smaller unit reporting occupancies of only 50%.

5.2.5 Main markets for pub accommodation are contractors and some corporates, short breaks, visits to friends and relatives, weddings related business, demand generated by events such as Glyndebourne, and some activity related demand from walkers and cyclists, particularly around Ashdown Forest, the South Downs and near the coast. The seasonality reflects that seen in hotels, with peaks between June and August and the wider season taking in May and September, with weekends attracting stronger demand than mid-week.

Sector Development Potential

5.2.6 The pub sector has been severely impacted by the Covid-19 pandemic and many operators are facing a future burdened by debt, escalating operating costs and staff shortages. Nonetheless, there does appear to be a market for the pub accommodation offer at all levels. This ranges from functional to luxury, and accommodation offers a third and very profitable income stream to pubs that can help their wider diversification needs and generate additional income for food and drink sales, especially in rural areas with little other provision. Accommodation at pubs is a great way to get supply into the wider area and create associated jobs and spending for the surrounding area. A number of pubs with accommodation have

been lost in the Wealden area, particularly to residential use. Accommodation is one way to help keep pubs running as viable businesses.

5.2.7 We see potential for pubs to continue to develop bedrooms on upper floors and in out-buildings, potentially adding units into their grounds such as eco cabins and glamping units, all of which have market appeal. There is also potential for developers and operators to take over existing pubs and re-position them into more upscale offers, such as gastropubs, with boutique bedrooms. Added to this, there is potential for new build pub/restaurants with associated bedroom blocks, though these will need a bigger catchment and footfall and therefore are likely to need locations closer to the main towns and other demand drivers such as major housing development and business parks. We have established interest in such developments via our soft market testing exercise and have seen evidence of regional players taking over existing pubs such as The Crown, Hailsham and see further potential and interest for this going forward.

5.3 Guest House and B&B Accommodation

Current Guest House and B&B Accommodation Supply

5.3.1 Our research has identified 40 guest houses and B&Bs in Wealden District with 123 rooms and 257 bedspaces. The Wealden planning area has 36 establishments of this type with 106 rooms and 223 bedspaces. This is shown in the table below:

Table 14
WEALDEN GUEST HOUSE AND B&B SUPPLY 2022

WEALDEN GUESTHOUSE & B&B SUPPLY

Location/TripAdvisor Rating	Excellent		Very good		Average		Poor		Not rated		Total	
	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds
Ashdown Forest	3	20							1	2	4	22
High Weald	3	16	5	20					7	28	15	64
Low Weald	9	50							4	28	13	78
Pevensey Bay	4	59									4	59
Total Guest House/B&B (planning area)	19	145	5	20					12	58	36	223
South Downs National Park	4	34									4	34
Total Guesthouse and B&B (Wealden District)	23	179	5	20					12	58	40	257

TABLE 15
WEALDEN GUEST HOUSE AND B&B ACCOMMODATION SUPPLY
BY AREA AND ESTABLISHMENT 2022

Guesthouse and B&B	Rooms	Bedspaces	Rating
Ashdown Forest			
Brambletye Manor Barn	3	6	Excellent
Fairstowe	2	4	Excellent
Holly House	5	10	Excellent
June Cottage	1	2	
Total:	11	22	
High Weald			
Hill Cottage	1	6	Excellent
Little Tidebrook Farm	3	6	Excellent
Lower Crabb Country House B&B	2	4	Excellent
Moaps Farm B&B	2	4	Very good
Old Mill Farm	3	6	Very good
Room For Two	1	2	Very good
Rose Cottage B&B	2	4	Very good
Yew House	2	4	Very good
Batchelors	1	6	
Bathurst	2	4	
Brockham House B&B	2	4	
Church House Bed & Breakfast	3	6	
Gate House B&B	1	2	
Knabbs Barn	2	4	
The Barn B&B	1	2	
Total:	28	64	
Low Weald			
Beechwood B&B	3	6	Excellent
Boreham House B&B	3	6	Excellent
Fontmills House B&B	2	4	Excellent
Hall Court Farm	3	6	Excellent
Old Copwood	2	4	Excellent
Old Whyly	4	8	Excellent
Rangers Cottage	2	4	Excellent
Starnash Farmhouse	4	8	Excellent
West Lodge B&B	2	4	Excellent
Deerview Farm	3	6	
Oast Park Lodge B&B	1	4	
South Paddock	2	4	
The Quilt Retreat	9	14	
Total:	40	78	
Pevensey Bay			
Butlers Farmhouse	3	6	Excellent
Cleavers Lyng	12	27	Excellent
Longleys Farm Cottage	3	8	Excellent
Wartling Place Country House	9	18	Excellent
Total:	27	59	
Total Guest House/B&B (planning area)	106	223	
South Downs National Park			
Bo-peep Farmhouse	3	6	Excellent
Chestnuts	4	8	Excellent
Riverdale House	5	10	Excellent
Green Oak Lodge (English Wine Centre)	5	10	Excellent
Total:	17	34	
Total Guest House/B&B (Wealden District)	123	257	

5.3.2 In terms of characteristics of supply, the following observations are made:

- The Low and High Weald areas have the majority of the supply, with provision in Ashdown Forest, Pevensey Bay and South Downs being more limited.
- Over half of these properties are rated excellent on TripAdvisor with 70% excellent or very good. The remainder are not rated.
- Most guest houses and B&Bs are small in scale, with an average of 3 bedrooms; only 3 properties have more than 5 bedrooms.
- The supply includes 5 B&Bs for Horses establishments (accommodation for horses and their riders).

5.3.3. The bed and breakfast sector is very fluid, with properties moving in and out of provision often to suit lifestyle choices. Operators often choose to run their home as a business for a limited time, with churn taking place typically within a 5-10 year timeframe. The sector therefore typically goes through significant change, much of which is outside the planning system, and which is difficult to influence. The audit identified 20 guest houses and bed and breakfast properties that no longer appear to be operating, which together represents over 80 bedrooms. The emergence of AirBnb has also had an impact, providing an easy route to market that is largely unregulated, but for which there does seem to be a demand – albeit that some of this is for whole home lettings as opposed to individual rooms.

Guest House and B&B Performance

5.3.4 In terms of performance, occupancies vary widely depending upon the business aspirations of owners, from as low as 12% (based on limited opening) to a high of 85% for some better quality and well-marketed establishments. For most guest houses and B&Bs, occupancies average 55-60%. The market is seasonal, peaking June to August when there is also evidence of 'denied demand' (business turned away because an accommodation establishment is full). Demand is strongest at weekends, but with demand across the year, and key markets being wedding guests, weekend breaks, walkers, visits to friends and relatives and visitors to events. Mid-week demand is much more seasonal. Contractor and business demand is very limited.

Sector Development Potential

5.3.5 The research suggests good market potential for further good quality guest house and B&B accommodation, in terms of new units and upgrading and expansion of existing sites. New units will be needed to replace the natural churn in the market.

6. WEALDEN NON-SERVICED ACCOMMODATION

6.1 Self-Catering Accommodation

Current Supply of Self-Catering Accommodation in Wealden

6.1.1. Our research has identified 175 self-catering operations in Wealden with a total of 319 units and 1,193 bedspaces. The Wealden planning area has 159 establishments, 277 units and 1056 bedspaces. This is shown in the table below.

Table 16
WEALDEN SELF-CATERING ACCOMMODATION SUPPLY 2022

Location/TripAdvisor Rating	Excellent		Very good		Average		Poor		Not rated		Total	
	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds
Ashdown Forest									7	24	7	24
High Weald	10	72							71	415	81	487
Low Weald	5	93							50	290	55	383
Pevensy Bay	2	10							14	152	16	162
Total Self-Catering (planning area)	17	175							142	881	159	1056
South Downs National Park	3	45							13	92	16	137
Total Self Catering (Wealden District)	20	220							155	973	175	1,193

6.1.2 In terms of the location and characteristics of supply, the following observations are made:

- The High Weald area has the largest concentration of supply, with 81 establishments and 487 bedspaces. The Low Weald area also has a good supply with 55 units and 383 bedspaces. The Ashdown Forest area has only 7 establishments and Pevensy has 16.
- By far the majority of the supply is in single units, but there are sites with multiple units, some of which also have central/leisure facilities; some of the larger ones are:

- Glyndley Manor Cottage Estate (16 units/84 bedspaces)
- Nutley Edges Cottages (15 units, 62 bedspaces)
- Pokes Manor (6 units/60 bedspaces)

And in the South Downs National Park area:

- Beachy Head Holiday Cottages (8 units/38 bedspaces)
- The Flint Barns at Rathfinney Estate (10 units/23 bedspaces)

- There are only 3 'supercottages' in Wealden District - establishments with a capacity of 20 people or more suitable for hosting large groups of family and friends.
- 38 establishments are advertised as being pet friendly.
- No properties are advertised as being access friendly.
- Only 20 of the 175 establishments have TripAdvisor ratings, but all are excellent.

6.1.3 A full listing of self-catering accommodation is as follows.

Table 17
WEALDEN SELF-CATERING ACCOMMODATION BY AREA AND ESTABLISHMENT 2022

Self Catering	Units	Bedspaces	Rating
Ashdown Forest			
Cubbs	2	4	
Hundred Acre Studio	1	2	
Providence Chapel	1	8	
The Cowshed	1	2	
The Hideaway	2	4	
The Piggery	1	2	
The Pump House at Tile lodge	1	2	
Total:	11	24	
High Weald			
Acorns Barn	3	6	Excellent
Bartley Mill Holiday Homes	2	13	Excellent
Belle Croix and Belle Vu Apartments	2	8	Excellent
Chelwood Farm Cottages	4	10	Excellent
Finches Holiday Cottage	3	6	Excellent
Sunnymead Farm Cottages (Russets & Pippins)	2	4	Excellent
The Games Barn	1	8	Excellent
The Lodge at Spring Farm	1	3	Excellent
The Stables Herons Ghyll	1	6	Excellent
Vines Cross Farm Holiday Cottages	2	8	Excellent
Allens Farm Loft	1	2	
Allen's Farm Oast	1	8	
Ancient Cottage	2	4	
Bathurst Studio	1	2	
Belle Maison	2	6	
Bibleham	1	10	
Bluestone Cottage	1	2	
Boreham Bridge Barn	1	6	
Brailsham Barn Holiday Lets	2	4	
Broadwater Forest Cottages	2	6	
Broom Cottage	1	6	
Broomhurst Grove	1	6	
Castle Cottage	1	6	

Wealden Visitor Accommodation Study – Pre-Final Report

Chauffeur's Cottage	1	6	
Chilsham Barn	1	4	
Colleens Oast Cottage	1	10	
Cowford Oast	1	2	
Cuckoo Barn	1	2	
Dairy Shorthorn & Friesian Cottages	2	13	
Deer Cottage	1	4	
Dewhurst Cottage	1	4	
Eastlea Cottage	1	7	
Fair Oak Farm	4	10	
Fairstowe Cottage	1	4	
Green Loanings Country House	1	16	
Half Moon	1	3	
Heath Retreat	3	6	
Hendall Manor Farm	1	6	
Holbrook Barn Guesthouse	1	2	
Hollambys Cottages (Bramble, Rose, Daffodil)	3	15	
Hoopers Farm Cottage	1	6	
Hurstwood Farm	3	12	
Jack's Cottage	1	4	
Kent Border Cottages	2	8	
Kings Lodge	3	6	
Leafwood Oast	1	2	
Leggs Field Barn	2	8	
Little Bucksteep Oast	1	7	
Little Ponds	1	6	
Marck House	1	22	
Morphews Cottage	1	6	
Pedlars Lodge	3	6	
Primula Cottage	1	6	
Romany	2	4	
Scrag Oak Oast	1	6	
Sherlocks Cottage	1	5	
Stable Cottage - Chesson Farm	1	4	
Step Cottage Barn	2	4	
Stone Mill	2	3	
Stonehouse Farm Cottage	1	2	
Streele Farm Cottages	2	12	
The Chapel at Barn Cottage	2	4	
The Cottage and House at Poundgate Park	2	16	
The Cottage in the Garden	1	2	
The Cowshed	1	4	
The Dairy at Coombe Hill Farm	1	2	
The Dairy Cottage	1	4	
The Garden Studio	1	2	
The Granary at Coes Vineyard	1	3	
The Hidden Cottage	2	5	
The Oast	1	4	
The Old Barn	1	6	
The Old Library	1	3	
The Old Workshop	1	4	
The Racing Stables	2	4	
The Water Tower	1	2	
Wadhurst Castle Cottage	1	6	
Warbleton Manor	5	11	

Wealden Visitor Accommodation Study – Pre-Final Report

West End Farm	4	6	
Wood Glen Cottage	1	2	
Woodpeckers	2	4	
Total:	128	487	
Low Weald			
Hale Barn	1	8	Excellent
Hawthbush Farm	2	13	Excellent
Little Shiplake	1	4	Excellent
Pekes Manor	6	60	Excellent
Woodside Cottages/ Beech Cottage	2	8	Excellent
2 Ringles Place	2	4	
3 New Road	2	4	
Barley Cottage	2	4	
Beechcroft Cottages	4	17	
Boreham House Stables	1	4	
Byre Cottage Studio	1	2	
Cherry Cottage	1	8	
Cowbeech Farm Cottage	2	4	
Decoy Cottages	3	12	
Dell Cottage	1	4	
Dill Hundred Cottage	1	8	
Elm Cottage	1	4	
Great Streele Farm Cottage	1	8	
Grooms Cottage	2	4	
Gun Hill Cottage	1	5	
Honeypot Cottage	2	4	
Horseshoes Farm House	1	6	
Jasmine Windmill	3	6	
Kingfisher	1	4	
Lime Cross Cottage	1	5	
Little Cabin by the Lake	1	2	
Little Downash Lookers Cottage	3	6	
Little London House	1	3	
Little Marsh Lodge	1	3	
Little Vets	1	2	
Magpie Cottage	3	6	
Mallingdown Oast	1	4	
Nutley Edges Cottages	15	62	
Oast Cottage	1	4	
Oat Cottage	1	4	
Paines Oast	1	4	
Polhills Cottage	1	4	
Poppets Cottage	1	2	
Priors Barn	1	2	
Ruttingham Cottage	2	5	
Standard Hill Cottage	1	2	
Studio Barn	3	4	
The Barn at Brook Lodge	2	4	
The Byre at Coombe Hill Farm	1	6	
The Cart Lodge	1	2	
The Cottage at Oak Tree Lodge	1	2	
The Cowstall	1	2	
The Old Orchard Bungalow	1	12	
The Pump House	1	2	
Tudor View	2	7	

Wheat Cottage	1	2	
White Lion Farm Cottages	2	4	
Windmill Barn	1	2	
Winkenhurst Cottage	3	5	
Wishing Well Cottage	2	4	
Total:	102	383	
Pevensey Bay			
Pevensey Bay Holiday Cottage (The Beach Hive)	3	6	Excellent
Wartling Place Country House Cottage	1	4	Excellent
5 Coast Lodge	1	2	
Annexe	2	4	
Bay View	1	4	
Beach Garden	3	8	
Beach Hive	3	6	
Cooks Beach House	1	10	
Dolphins	1	6	
Elswick	1	6	
Glyndley Manor Cottage Estate	16	84	
Little Chase	1	2	
Magnolia Cottage	1	4	
Moorhen Cottage (Court Lodge Farm)	1	2	
Pebble Beach	1	4	
Pevensey Bay Beach House	1	10	
Total:	38	162	
Total Self Catering (planning area)	277	1056	
South Downs National Park			
Dawes House	3	6	Excellent
Rose Cottage Inn (Beacon View, Hikers Rest, Parlor Room and The Loft)	5	16	Excellent
The Flint Barns - Rathfinny Estate	10	23	Excellent
Alfriston Woodland Cabins	2	8	
Beachy Head Holiday Cottages	8	38	
Candlemas Studio	1	2	
Dacres	1	2	
Danny Cottage	1	6	
Darwin Cottage	1	4	
Fox Cottage	1	2	
Jackson's Cabin	1	2	
Little Friston Lodge	1	4	
Riverbank Cottage	3	6	
Southdown Barn Annexe	1	2	
The Dene	1	12	
The Secret Cottage (Steamer Cottage)	2	4	
Total:	42	137	
Total Self-Catering (Wealden District)	319	1,193	

6.1.4 Much like B&B accommodation, a lot of the self-catering supply is fluid, moving in and out of the market to suit owner circumstances. The audit identified a significant number of properties thought to have ceased trading in the holiday market who could not be contacted by phone or email and were not visible online – this equated to 28 establishments with 51 units. Nonetheless, the overall supply has increased significantly since the previous study. In terms of proposals, no significant intelligence

was available from planning applications relating to holiday cottage/self-catering accommodation, as this is not currently monitored by the Council for planning purposes. However, six self-catering businesses interviewed in the CATI survey indicated that they were looking to expand. They were:

- Poundgate Park Cottage & House, Crowborough;
- Hurstwood Farm, Uckfield;
- Hendall Manor Farm, Uckfield;
- Broadwater Forest Cottage, near Tunbridge Wells;
- The Cottage at Oak Tree Lodge, Fletching; and
- Glyndley Manor Cottages, Pevensey.

We are also aware that Bewl Water, Wadhurst has submitted a planning application to Wealden District Council for the extension and alteration to the Boat House Bistro, a change of use to form 6 X 1 bedroom and 5 X 2 bedroom tourist units, as well as the erection of a café with terrace, amongst other matters.

Self-Catering Accommodation Performance

- 6.1.5 The evidence from the AirDna/VRBO analytics platform referred to in section 4 of this report demonstrates a strong market for non-serviced accommodation in Wealden overall, with a Grade A Investor Score – that being made up of overall rental demand, revenue growth, expected income and cost. In addition, the CATI survey found all non-serviced accommodation to be operating at an average of 68% pre-Covid, but with a stronger 74% forecast for 2022. This appears to be equally true for the self-catering accommodation segment, with occupancies pre-Covid averaging 71% and post-Covid (forecasts for 2022) at 73% occupancy. However, 30% of establishments were forecasting occupancies in excess of 73%, with a number of establishments forecasting occupancies in the 80% and 90% range. At these levels of occupancy, there will be business being denied particularly in peak periods. The area has a propensity for shorter stays in smaller properties, attracting couples and smaller families who are able to travel at all times of year contributing to strong occupancies outside the main peak, especially at weekends. However, larger units and multiple unit sites are also attracting larger groups including for multi-generational family and friends' gatherings.

Sector Development Potential

- 6.1.6 The prospects for the self-catering sector are good, with significant opportunities to capitalise on post-Covid and longer-term trends in the market. There is evidence of

gaps in supply in terms of supercottages, self-catering complexes, pet-friendly accommodation and accessible self-catering accommodation, plus a limited supply of units with hot tubs. Additional luxury and quirky self-catering accommodation products would also present something new and different and help attract Millennial markets. Premium offers should be encouraged as this area has an affluent catchment and the VRBO/AirDna data shows good rental levels being achieved. This would also accord with the Council's ambitions to deliver quality and maximise value from overnight stays. Eco-friendly accommodation with strong sustainability credentials is also something to be encouraged that will attract significant elements of the market increasingly sensitised by climate change impacts and seeking out sustainable tourism experiences.

6.2 Touring Caravan & Camping

Current Supply of Touring Caravan & Camping in Wealden

6.2.1 The audit research has identified 43 touring caravan & camping sites in Wealden with 4,767 bedspaces, of which 42 are in the Wealden planning area with 4,416 bedspaces.

Table 18
WEALDEN CARAVAN & CAMPING SITES 2022

Location/ TripAdvisor Rating	Excellent		Very good		Average		Poor		Not rated		Total	
	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds
Ashdown Forest	2	211							2	155	4	366
High Weald	3	175	2	358					3	81	8	614
Low Weald	21	2,320	3	291					1	59	25	2,670
Pevensey Bay	2	495							2	271	4	766
Total Touring Caravan & Camping (Planning area)	28	3,201	5	649					8	568	41	4,416
South Downs National Park			2	351							2	351
Total Touring, Caravan & Camping	28	3,201	7	1000					8	568	43	4,767

6.2.2 In terms of the characteristics and location of supply, the following observations are made:

- The Low Weald area has the largest amount of provision with 25 sites and 2,670 bedspaces, which equates to over 60% of all provision. Provision in the Pevensey Bay area is next largest at 766 bedspaces at 4 sites.
- 70% of establishments are graded, mostly excellent with some very good.
- There are a number of larger sites, including several managed by the Caravan & Camping Club (Crowborough (90 units/270 pitches), Heaven Farm (25 units

/88 pitches), Horam Manor (98 units/343 pitches) as well as the Broomfield Farm Caravan & Motorhome Club site (80 units/280 pitches). Other large sites are Alfriston Camping Park (60 units/210 pitches), Chilley Farm (72 units/253 pitches), Canon Camping Park (90 units/315 pitches) and Cinderford (58 units/203 pitches).

- The average size of an individual site is 32 pitches and 111 bedspaces.
- 32 sites are advertise as being pet friendly (73%).
- A number of the identified sites also feature glamping units.

In addition to the above supply, the Caravan & Camping Clubs Norman's Bay site in Rother District, adjoins the Wealden administrative border and has 200 touring pitches.

6.2.3 A full listing (excluding the site above in Rother District) can be found below.

Table 19

WEALDEN CARAVAN AND CAMPING SITES BY AREA AND ESTABLISHMENT 2022

Touring, Caravan and Camping	Pitches/ Units	Bedspaces	Rating
Ashdown Forest			
St Ives Farm	45	158	Excellent
Stairs Farm CL	15	53	Excellent
Blackland Farm (Guides)	40	120	
Roko Bicycle Camping Club	10	35	
Total:	110	366	
High Weald			
Idle Hours Owsbury Park	22	77	Excellent
Greenviews Caravan Park	20	70	Excellent
Crowborough Camping and Caravanning Club Site	90	270	Very good
Heaven Farm Caravan & Camping Club	25	88	Very good
Hurstwood Farm	10	35	
Rosewood Farm CL	4	14	
Warbleton Farm Campsite	8	28	Excellent
Tinkers Wood	9	32	
Total:	188	614	
Low Weald			
Broomfield Farm Caravan Club Site	80	280	Excellent
Bulls Head Camp Site	25	88	Excellent
Cider House Farm	28	84	Excellent
Horam Manor Touring Caravan & Camping Sites Park	98	343	Excellent
Beeches Place Farm CL	15	45	Excellent
Chiddingly Camp and Caravan Park (formerly Latchetts)	20	70	Excellent
Merrylands @ Chiddingly	45	158	Excellent
White House Farm CL	5	18	Excellent

Boathouse Farm Camping	40	140	Excellent
Oakfield Farm Camping	26	92	Excellent
Dernwood Farm Wild Camping	34	102	Excellent
Embers Camping	41	182	Excellent
Fontmills Farm Camp Site	33	117	Excellent
Hale Farm Campsite	36	147	Excellent
Wimbles Farm Camping (Experience Sussex)	8	25	Excellent
Little Downash Farm Camping	15	58	Excellent
Honeys Green Farm Camping Park	30	105	Excellent
Cuckoos Rest Caravan and Camping Park	31	108	Excellent
Blackstock House	8	28	Excellent
Old Mill	12	42	Excellent
Peel House Farm Caravan Park	25	88	Excellent
Cinderford Camping	58	203	Very good
Heronshire Manor Farm	20	70	Very good
Laughing Fish Camping CL	5	18	Very good
Scallow Caravan & Campsite	18	59	
Total:	756	2,670	
Pevensey Bay			
Fairfields Farm	60	180	Excellent
Canon Camping Park	90	315	Excellent
Chilley Farm Campsite	72	253	
Uplands Farm CL	5	18	
Total:	227	766	
Total Caravan & Camping (Planning area)	1281	4416	
South Downs National Park			
Alfriston Camping Park	60	210	Very good
Bramley Park Camping	39	141	Very good
Total:	99	351	
Total Caravan & Camping (Wealden District)	1,380	4,767	

6.2.4 Changes in supply since the previous 2009 study and audit have seen the following sites:

- Identified as closed through the audit:
 - Forgewood, Eridge (180 bedspaces)
 - Heronsdale Manor (45 bedspaces)
 - Hidden Spring Vineyard, Horam (60 bedspaces)
 - Knockhatch Campsite, Hailsham (150 bedspaces)
 - Plum Hill Farm, Herstmonceux (60 bedspaces)
 - The Old Dairy Farm, Uckfield (45 bedspaces)
 - Tree Retreats, Nutley (45 bedspaces)
 - Woodland View Touring Park, Horam (84 bedspaces)
 - Runt In Tun, Heathfield (53 bedspaces)
 - The Homestead, Hailsham (18 bedspaces)
 - Kidbrook Farm Camping, Forest Row (18 bedspaces)
 - Ash Farm, Polegate (35 bedspaces)
 - At The Homestead, Hailsham (53 bedspaces)

- Bay View at Pevensey is no longer a touring site and is converting to 91 static caravan holiday units.
- In terms of new supply:
 - A planning application search identified a temporary planning permission being approved at Bewl Water, Wadhurst for a campsite of up to 80 pitches to operate between May and September each year. The permission is for three years only at this stage.
- The CATI survey identified the following caravan and camping sites who are considering expansion/new development:
 - Beeches Place Farm
 - Battenhurst Meadows
 - Scallow Caravan & Campsite
 - Bay View has replaced some of its touring caravan pitches for 30 holiday lodges and has planning permission for another 61.

Touring Caravan & Camp Site Performance

- 6.2.5 The CATI survey reported average occupancies on touring caravan and camping sites in Wealden in 2019 at 59%, but forecasts for 2022 are 74%. This reflects the trend for holidaying with outdoor experiences. Occupancies ranged from a low of 40% in 2019 to a high forecast of 80% in 2022. Key markets are families and couples, at different times of year, mostly for 3-4 nights, other than in school holidays. AirDna data also showed a growth in average occupancy at caravan and camp sites in Wealden District to 74% in 2019.

Sector Development Potential

- 6.2.6 Recent market trends appear to support the growth of the caravan and camping site sector. Research undertaken by IBISWorld projects the market size of the camping and caravan industry in the UK to increase 139.6% in 2022 from 2021. Even given a Covid-19 'bounce' factor, longer term trends appear in favour of camping and caravanning. Analysis from a combination of Mintel's 'Camping and Caravanning – UK – January 2021' report, Visit England's '2021 tourism forecast' and data from the Office of National Statistics that focussed on the camping and caravan sector in 2021 all indicate that this fragmented sector is well placed to expand. The Mintel research identified that:

“The industry is dominated by larger holiday parks who have been increasing investment in high-end static caravans and expanding their ‘glamping’ options such as fully furnished yurts. Pre 2020 saw the beginnings of a trend for minimalist style pop-up campsites with many farmers and landowners realising

the economic benefits of diversifying into tourism – an existing trajectory only further fuelled by Covid-19 and the lifting of restrictions over the summer. This level of diversity of choice is appealing to first timers, with Mintel finding 12% of consumers who have camped or caravanned in the last three years were new to the experience.

The popularity of Camping and Caravanning has been helped with a general increase in the demand for shorter, more regular trips away over longer, more expensive annual holidays. This trend is expected to continue with Visit Britain reporting a third of consumers who have been on, or would like to go on, a camping or caravanning holiday are interested in taking regular short breaks several times a year.

- 6.2.7 The research shows shortages of caravan and camping facilities in Wealden at peak times with high levels of occupancy being achieved over the main summer months and outside these at weekends and school holidays. There are market opportunities for existing sites to expand, upgrade and to add higher value units such as glamping tents, eco pods and even lodges to their offer. Existing sites might also wish to provide more of a complete offer to customers to meet emerging needs by adding leisure facilities, catering facilities, new shower/facility blocks, improved access and facilities for disabled visitors, and on-site accommodation for Managers. Demand for off-peak travel could also lead to a demand to extend opening seasonal periods, albeit with associated restrictions on occupancy. There are opportunities for attractions, pubs and facilities to add a camping offer to their sites to increase length of stay and spend, and we have seen some examples of this. Motorhome stopovers are another opportunity, at existing sites, at attractions, facilities and pubs, and as standalone 'aires' type units (e.g. in country parks and on car parks). There is also market potential for additional caravan and camping site provision of scale and interest has been expressed by Caravan and Motorhome Club. This would typically include 100-120 pitches plus some glamping and pods. They are active and well-funded developers and operators with a growing membership that can help attract new market to Wealden.

6.3 Glamping

Current Supply of Glamping in Wealden

- 6.3.1 This is a relatively new area of visitor accommodation provision that was just emerging at the time of the previous 2009 study. The research has identified 16 individual

establishments with 42 units/pitches and 168 bedspaces, all of which are in the Wealden planning area. This is shown in the table below.

Table 20
WEALDEN GLAMPING SUPPLY 2022

Location/TripAdvisor Rating	Excellent		Very good		Average		Poor		Not rated		Total	
	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds
Ashdown Forest									1	2	1	2
High Weald	3	76							8	40	11	116
Low Weald	1	2							2	16	3	18
Pevensey Bay	1	32									1	32
Total Glamping (planning area)	5	110							11	58	16	168
South Downs National Park												
Total Glamping (Wealden District)	5	110							11	58	16	168

6.3.2 The full list of glamping sites in Wealden District, including their scale TripAdvisor rating is set out below.

Table 21
WEALDEN GLAMPING SUPPLY BY AREA AND ESTABLISHMENT 2022

Glamping	Units/Pitches	Bedspaces	Rating
Ashdown Forest			
Forest Den	1	2	
Total:	1	2	
High Weald			
Forest Garden Shovelstrode Camping	6	22	Excellent
Blue Caps Glamping	2	12	Excellent
Sunninglye Farm	7	42	Excellent
Bensfield Treehouse	1	2	
Downsview Vineyard	4	12	
Hoots Tree House	1	4	
Hurstwood Farm	2	4	
Nutley Edges Cottages	2	8	
The Sett Shepherds Hut at Coes Farm	1	2	
Treehouse at Marklye	2	4	
Treetops	1	4	
Total:	29	116	
Low Weald			
Starnash Farmhouse	1	2	Excellent
Graywood Canvas Cottages	2	10	
The Big Green Bus	1	6	
Total:	4	18	
Pevensey Bay			
Big Sky Tipi Holidays	8	32	Excellent
Total:	8	32	
Total Glamping (planning area & District)	42	168	

6.3.3 In terms of the location and characteristics of supply, the following observations are made:

- The High Weald area has the bulk of the provision (70%) with 11 establishments, 29 units and 116 bedspaces;
- There are no glamping sites in the South Downs National Park area of Wealden;
- The average size of a unit or pitch is 4 bedspaces;
- Most establishments have one or two glamping units but there are some sites with groups of units – Forest Garden Shovelstrode (6 units), Sunninglye Farm (7 units), Downsview Vineyard (4 units), Big Sky Tipi Holidays (8 units);
- Sunninglye Farm is part of the Featherdown Farms network giving them both profile and distribution through this brand nationally and internationally;
- There are a range of unit types – bell tents, yurts, safari tents, shepherds huts, pods, geodomes, treehouses and a converted green double decker bus;
- Three of the sites are advertise as being pet friendly;
- Only five sites are TripAdvisor rated, but all are excellent.

6.3.4 The following changes in supply since the previous audit and study in 2009 have been identified through the audit and wider research:

- Closures
 - Hadlow Hideaways, Uckfield (5 units/42 bedspaces)
 - The Rolling Downs Glamping, Halland (8 bedspaces)
 - The Shepherds Hut Wimbles Farm, Heathfield (1 unit/4 bedspaces)
- Glamping planning applications through the planning system:
 - Hylands Farm, Hailsham (3 glamping pods and facilities)
 - Longleys Farm, Hailsham (5 glamping units)
 - Lime Cross Nursery, Herstmonceux (a single glamping unit)
 - Stonehill Farm, Chiddingly (2 glamping pods)
 - Water Bailiffs Cottage, Sedlescome (5 glamping units)
 - Blue Caps Farm, Wadhurst (glamping site)
 - Brick Farm Lakes, Windmill Hill (4 glamping pods)
- Operator interviews
 - Downsview Vineyard are adding three more glamping yurts and some low scale/pop-up catering.

Glamping Performance

- 6.3.5 The average occupancy of glamping sites interviewed was 78% in 2019, and 77% forecast for 2022. However, some were performing more strongly than this, with one unit achieving 100% occupancy for the year. The appeal of glamping to both couples and families accounts for the string demand across the year.

Sector Development Potential

- 6.3.6 A cooler image for camping and the emergence of glamping as luxury camping, has been one of the big trends seen in the visitor accommodation market over the past 10 years that has been accelerated by Covid-19 and is forecast to continue. Glamping also pushes lots of other trends that work well for a destination such as Wealden – the scale and nature of glamping means it is well-suited to sensitive landscapes and provides an ideal diversification model for farms and estates; glamping is very eco-friendly and can be developed sustainably, to the point of off-grid, helping meet zero carbon ambitions and sustainable travel demands; it also provides the opportunity to be innovative in design, to introduce quirky design and to develop immersive experiences in nature, all of which has strong appeal to Millennial markets that are high spending, can travel at any time of year, who want to be 'wowed' and who will share their experiences widely on social media. There is market potential to further develop glamping of all types across Wealden as individual/small numbers of units and as larger groups of units, or even a glamping 'resort', subject to the appropriate sites being found. The use of more permanent structures would extend the season to year-round and help even out seasonality.

6.4 Holiday Lodges & Holiday Parks

Current Supply of Holiday Lodges & Holiday Parks

- 6.4.1 Our research has identified 12 holiday lodge and park sites in Wealden District with 533 units and 1,882 bedspaces. 11 of these are in the Wealden planning area, with 532 units and 1,880 bedspaces. This is shown in the table below:

Table 22
WEALDEN HOLIDAY LODGE & HOLIDAY PARK SUPPLY 2022

Location/TripAdvisor Rating	Excellent		Very good		Average		Poor		Not rated		Total	
	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds	Est.	Beds
Ashdown Forest												
High Weald									3	19	3	19
Low Weald			1	116					2	6	3	122
Pevensey Bay	1	1,043	1	319					3	377	5	1739
Total Holiday Lodge & Park (Planning area)	1	1043	2	435					8	402	11	1,880
South Downs National Park									1	2	1	2
Total Holiday Lodge and Park (Wealden District)	1	1,043	2	435					9	404	12	1882

6.4.2 In terms of location and characteristics of supply, the following observations are made:

- The major share of provision is at Pevensey Bay, where establishments provide 497 units accounting for 1,739 bedspaces; this is dominated by Pevensey Bay Holiday Park (formerly Martello Beach) with 298 units and 1,043 bedspaces; Pevensey Bay also has other larger park sites at Bay View (91 units/319 bedspaces), Grey Tower (83 units/291 bedspaces) and Warren Wood (24 units/84 bedspaces);
- The only other larger park site is in the Low Weald, named Golden Cross Park has 29 holiday lodges and 116 bedspaces. However, since the audit this site been subject to a planning application for the change of use of the holiday park to the stationing of 29 residential park homes (resulting in a loss of tourism accommodation) that was approved by the local planning authority.
- The rest of the supply is either individual lodges or two lodges.
- There are no holiday lodges or holiday parks in the Ashdown Forest area.

In addition to the above, Normans Bay Caravan Park is just outside the Wealden administrative area in Rother District; the site contains 175 privately owned statics.

Table 23
WEALDEN HOLIDAY LODGE AND HOLIDAY PARK SUPPLY
BY AREA AND ESTABLISHMENT 2022

Holiday Lodge and Parks	Units	Bedspace	Rating
High Weald			
Cleeve Lodge	1	4	
Sheffield Park Lodge and Wagon	2	4	
Court Lodge Oast	1	11	
Total:	4	19	
Low Weald			
Golden Cross Park (Holiday Lodges)	29	116	Very good
Cedar Lodge	1	2	
Hesmonds Oast Lodge	1	4	
Total:	31	122	
Pevensey Bay			
Bay View Holiday Park	91	319	Very good
Pevensey Holiday Park	298	1043	Excellent
Grey Tower Caravan Site	83	291	
Warren Wood Park	24	84	
Stone Acre Lodge	1	2	
Total:	497	1739	
Total Holiday Lodge & Park (Planning area)	532	1880	
South Downs National Park			
Alfriston Lodge	1	2	
Total:	1	2	
Total Holiday Lodge & Park (Wealden District)	533	1,882	

6.4.3 In terms of changes in supply since the previous study and audit in 2009 the following is noted:

- Bay View at Pevensey has become a 91-unit static holiday park, moving away from its previous tourer status; and
- The Martello Beach at Pevensey Bay is now Pevensey Bay Holiday Park, part of Park Holidays.

Performance of Holiday Lodges and Holiday Parks

6.4.4 The holiday parks model is a mixture of units let to the wider market and units that are privately owned. Occupancies appear to have been very strong post-Covid-19, at close to full for most of the operating period and particularly school holidays, with strong demand also for holiday lodge/unit sales. The market for these units is a mix of older/retired couples, particularly for the ownership model, and families for those sites letting more widely and with a range of central facilities. Individual holiday lodges are more akin to the glamping model and performance.

Sector Development Potential

- 6.4.5 Holiday Parks have been reported as one of the ‘winners’ of the post-Covid-19 environment, benefitting from the staycation boom and the appeal of the outdoors, as well as broadening their market. There are now several larger operators buying up smaller, family-owned parks and investing in their quality and scale, bringing a new professionalism and exposure to the market. On the sales side, an ageing population favours continued strong demand for privately owned units. Higher specification units allow demand to be catered for outside the peak months and through the winter if opening restrictions will allow, but there remains a tension around the scope for permanent residential use alongside concern to retain holiday use. All of this would point to a potential for existing sites in Wealden to upgrade both their units and their central facilities, as well as to respond to trends in the market to be pet friendly, access friendly and green. There is potential and demand to operate year-round, with appropriate planning restrictions around holiday use in place, provided there are no other constraining factors such as flooding. If land is available, there could be scope for sites to expand, and if suitable sites could be found in planning terms, there is demand from national developers and operators to bring forward new sites.

6.5 Group Youth & Activity-Related Accommodation

Current Supply of Group Youth & Activity-Related Accommodation

- 6.5.1 The research has identified 17 properties in this category in Wealden District with a combined capacity of 1,837 bedspaces. Fifteen of these with a capacity of 1,790 bedspaces are in the Wealden planning area. They provide a mix of accommodation in type and scale as outlined below.
- Three scout's sites account for the majority of the bedspaces, 1,205 in all (66%);
 - There are 10 sites sold as hostels or group properties, with 501 bedspaces; two of these are significant in scale: the PGL site at Windmill Hill with a capacity of 250, and Pilgrim Hall, a Christian meeting and conference venue near Uckfield;
 - The other sites are a mix of 2 wedding venues (107 bedspaces) a riding centre (4 bedspaces) and a retreat (20 bedspaces);
 - The largest amount of supply is in High Weald area, followed by Low Weald area, then the Ashdown Forest area; supply in Pevensey Bay area and South Downs National Park in Wealden is limited.

- 6.5.2 The full listings can be found in the table below.

Table 24
WEALDEN GROUP YOUTH AND ACTIVITY RELATED ACCOMODATION 2022

Site	Type/ Establishment	Capacity/ Bedspaces
Ashdown Forest		
Broadstone Warren	Scouts	235
Home Farm House	Group/Hostel	12
Ashdown Forest Riding Centre	Riding Centre	4
Total	3	251
High Weald		
Adamswell Campsite	Scouts	750
Poundgate Park Cottage and House	Group/Hostel	16
Cannon Barn at Boring House Farm	Group/Hostel	10
Merrieweathers	Group/Hostel	18
Spring Farm Holiday House	Group/Hostel	12
The Old Glebe	Group/Hostel	24
Wellbrook House	Group/Hostel	22
Total	7	852
Low Weald		
Blackstock House	Wedding Venue	27
Bushy Wood Activity Centre	Scouts	220
Pilgrim Hall	Group/Hostel	110
Windmill Hill PGL	Group/Hostel	250
Total	4	607
Pevensey Bay		
Montague Farm	Wedding Venue	80
Total	1	80
Total Other (planning area)	15	1790
South Downs National Park		
Tilton House and Annexe	Retreat	20
Gayles Retreat	Group/Hostel	27
Total	2	47
Total Other (Wealden District)	17	1837

- 6.5.3 In terms of changes in supply since the 2009 study and audit, the Bushy Wood Scout Centre indicated in the CATI survey that they are looking to expand their site.

Performance of Group Youth & Activity-Related Accommodation

- 6.5.4 This category of accommodation represents a broad range of provision and markets being catered for making it difficult to draw more general trends and conclusions. The properties that responded to the survey quoted occupancies in 2019 of between 70% and 90%. They appear to have recovered well, with occupancies of 90% forecast for 2022. Typically group and youth accommodation will cater for a mix of education and outdoor activity markets, with some families at weekends and during school holidays.

Sector Development Potential

- 6.5.5 Prospects for hostel type accommodation are good, given the surge of interest during and post-pandemic in outdoor activities. The same applies to group holidays, which have boomed both in terms of multi-generational groups and groups of friends and family getting together. Increased interest in cycling and walking is likely to further this growth, not just from youth markets, including potential for bunkhouse barns in rural areas. Wellness retreats is a fast-expanding segment of the market that Wealden could look to further develop, focusing on health in both body and mind, and which can be developed in a low-key way. The developer survey identified interest from a developer/operator of wellness retreats of c. 20 units with associated holistic therapies.

7. VISITOR ACCOMMODATION PLANNING POLICIES

7.1 Introduction

7.1.1 This section of the report presents the overview findings of our review of rural tourism and visitor accommodation planning policies in neighbouring districts, supplemented by some examples from rural destinations elsewhere in the UK. The review also draws out some of the key lessons that Wealden may consider in framing its own policies going forward, given the issues for Wealden District highlighted within this report.

7.1.2 Neighbouring local authorities were contacted by email to identify and explore these policies. The local authorities contacted were:

- Eastbourne Borough Council
- Lewes District Council
- Mid-Sussex District Council
- Rother District Council
- Sevenoaks District Council
- South Downs National Park
- Tandridge District Council
- Tunbridge Wells Borough Council

7.1.3 This was complemented by desktop research to establish a more detailed understanding of the policy, the context and rationale behind it, the evidence base that informed it, the age and status of the policy/plan, timings around the new local plan preparation and the Council's own potential options contained within the Council's 'Direction of Travel' document.

7.1.4 In the case of rural tourism and visitor accommodation policies elsewhere in the UK, we have focused on those that could illustrate an additional dimension to planning for tourism and visitor accommodation development, for example, through a more permissive policy to tourism development in the countryside and recognising that some proposals require a countryside setting. These include:

- Arun District Council;
- Cheshire East Council;
- The Cotswolds District Council; and
- Wiltshire Council.

7.2 Planning Policies in Surrounding Districts

7.2.1 In general, we note the following in relation to neighbouring district/borough plans and policies:

- Several districts have adopted planning policies in place, but these are considerably out of date (over 5 years old and includes Eastbourne, Tandridge, Sevenoaks and Tunbridge Wells¹²);
- The evidence base for most of the tourism policies includes economic impact studies, area tourism strategies/Destination Management Plans, and hotel and visitor accommodation studies;
- All except Mid-Sussex have retention policies – Rother's is a generic retention policy across sectors (including tourism assets), but the others are specifically focused on tourist accommodation and/or tourism assets. They commonly refer to demonstration of marketing for sale at a realistic price for a minimum of 1-2 years, demonstration of non-viability in its current use, and in some cases evidence of consideration of alternative tourism/accommodation uses;
- The South Downs National Park and Eastbourne Borough Council have produced additional guidance on tourist accommodation retention – Eastbourne's covers all accommodation, whereas South Downs National Park covers camping and glamping;
- All have tourism policies; some also have an additional tourist accommodation policy;
- In a number of cases, tourism development and specific tourism policies are supported by the inclusion of tourism development in strategic objectives particularly around sustaining the local economy (Tandridge, Eastbourne, Mid-Sussex);
- Most also have other policies in the local plan that feature tourism development, particularly in relation to development in the countryside, opportunities for farm diversification and the re-use of existing buildings, and in relation to some strategic sites;
- Policies for tourism and visitor accommodation development are generally permissive, subject to a series of criteria around meeting identified needs and particularly in the countryside, relating to scale, impact and other plan policies;

¹² It should be noted that Tunbridge Wells Borough Council is awaiting the outcome of their new Local Plan at the time of writing.

- Policies tend to support the upgrading and extension of existing tourist accommodation, as well as the development of new tourist accommodation subject to criteria;
- Some policies emphasise tourism accommodation's role in relation to wider tourism development ambitions (e.g. Rother looks for accommodation to support active use along the coast, support for sustainable tourism activities (South Downs National Park), develops markets for local produce (Rother);
- 'Sustainable' tourism and 'sustainable' tourist accommodation feature in a number of the adopted policies (South Downs National Park, Lewes, Mid-Sussex, Tunbridge Wells);
- There is some recognition in policies and supporting text of the benefits of tourism;
- Policies relating to tourism development in the countryside in some cases specifically recognise the need for a rural location, but in the main identify developments of small scale, utilising existing buildings where possible, and with proportionate new build;
- The South Downs National Park makes specific reference to new accommodation being closely associated with tourism attractions and infrastructure;
- Addressing seasonality issues features in a number of the adopted plans, and not restricting operators extending their season, whilst applying holiday occupancy conditions to prevent permanent residential use (Rother, South Downs National Park, Lewes, Tunbridge Wells) rather than limited opening periods;
- Where certain forms of visitor accommodation are of particular importance to an area, or where there are specific issues, some local authorities have a separate policy or guidance. This is the case in South Downs National Park with glamping and camping, in Lewes with camping and caravanning, and hotel development in Sevenoaks.

7.3 Key Messages

7.3.1 Whilst appreciating that policies for any district need to reflect the unique and special circumstances of that area and the issues faced, there are some key messages coming out of the analysis of tourism planning policy in neighbouring areas that Wealden might consider in framing its own tourist accommodation policies in the emerging local plan. We add to this below from our experience of development and planning frameworks elsewhere in the country to identify a series of elements that a 'model' planning policy for rural tourist accommodation development might consider.

7.3.2 There are three generic messages from this wider sector intelligence worth highlighting which are:

- Framing policies positively (i.e. development will be permitted subject to); there is some debate amongst planning teams we have consulted across the country as to whether to take a more or less approach to the criteria that the permission would be subject to, in terms of listing potentially many criteria, or simply making reference to be compliant with other plan policies;
- There are benefits in providing 'planning policy hooks' to hang future permissions on for when an authority may want to permit in exceptional circumstances; for example, having a published tourism strategy or destination management plan or supporting evidence base that identifies market potential for a particular type of accommodation development;
- Making reference in the supporting text to tourist accommodation policies to the types of accommodation that market potential has been identified for in supporting studies or Destination Management Plans helps to direct and give clarity to developers.

7.3.3 Bearing the above in mind and the review of neighbouring authority tourist accommodation policies, aspects of a positive approach to planning that Wealden could consider in its emerging local plan include:

- Recognising tourism as an important economic contributor, to ensure this is given full weight in any decision-making on proposals alongside other impacts. This has been done elsewhere through including a strategic objective relating to developing the tourism economy and featuring the development of tourism in wider economy planning policies.

- Facilitating appropriate tourist accommodation development in the countryside, which is particularly important to Wealden given its predominantly rural nature. Examples of policy actions that have supported this include:
 - Referencing the importance of tourist development and activity to rural economies and communities;
 - Encouraging tourism as a route to farm and estate diversification;
 - Allowing for new build tourism development/extensions in the countryside, subject to other policy criteria, as well as the conversion of existing buildings;
 - Recognising that some types of tourism development require a rural setting that a built-up location cannot deliver;
 - Whilst access to tourism development by sustainable means is desirable, there may be other options/benefits that can make a site acceptable in planning terms (i.e. improvements to accessibility, or the re-use of an heritage asset for example);
 - Encouraging the development of tourist accommodation that is closely associated with existing attractions and facilities to potentially piggy-back on existing infrastructure but also help make existing tourism operations more sustainable.
- Supporting sustainable tourism, with sustainability woven into new development and operation. Examples include policies that:
 - Encourage sustainable design principles as a contribution to net zero ambitions, helping reduce waste, energy consumption and operating costs;
 - Promote year-round tourism activity and broader market appeal to reduce seasonality and help underpin visitor accommodation viability. Planning can help by lifting seasonal restrictions on opening where safe and practical to do so, whilst still securing tourism use through occupancy conditions.
 - Staff accommodation may be required in some cases, both to serve visitor needs and for security, and would also reduce travel to work trips for key staff members.
- A robust retention policy helping to resist planning applications for the change of use of successful visitor accommodation to higher value permanent residential and/or other uses and protect a critical mass of tourism infrastructure that could be difficult to replace once lost, given the intense demand for land. This could be supported by additional guidance as needed. Aligning marketing for sale and viability assessment criteria and approaches

with neighbouring authorities would present a united front and prevent perceived 'weaker' policy areas being targeted. The widespread review of local plans that is underway in neighbouring authorities presents a timely opportunity to discuss this under the duty-to-cooperate process.

8. CONCLUSIONS AND RECOMMENDATIONS

8.1 The Opportunity

8.1.1 This study has considered the existing scale, nature, location and performance of Wealden's hotel and visitor accommodation sector and from this baseline, the potential for its future development. This has been informed by understanding the destination vision, drivers to growth locally, trends in the market nationally, the ambitions for expansion and new development from existing operators and developers/operators looking to be represented in the study area, a mapping and gapping analysis and widespread public and private sector consultation and engagement.

8.1.2 Some of the key **strengths, weaknesses, opportunities and threats** to the accommodation offer and its operating and development environment in Wealden are highlighted in the SWOT analysis below.

Table 25

WEALDEN VISITOR ACCOMMODATION REVIEW SWOT ANALYSIS

STRENGTHS	WEAKNESSES
• Attractive rural area with appeal to staying visitors; • Good for outdoor activities particularly walking, cycling; • Proximity to SDNP is a big draw to visitors; • Other strong attractors includes the Ashdown Forest, Herstmonceux Castle, Bewl Water, Birling Gap and Cuckmere; • Significant base of accommodation to build on; • Already some accommodation of scale – hotels, holiday parks and touring caravan sites; • Large and affluent catchment area taking in London and affluent counties; • Generally strong accommodation performance and good bounce back from Covid-19 pandemic; • There is a viticulture niche; and • Established and emerging marketing partnerships	• Dominance of day visitors; • Limited town population for some accommodation products (hotels and pubs require 50k-100k minimum); • Loss of hotels and pubs to residential and other uses; • Recognised shortage of accommodation by type; • Shortage of accommodation generally at peak periods and business being turned away as establishments are full; • A lot of seasonal accommodation/market; • Limited corporate base (for serviced accommodation); • Limited accommodation that is graded/rated to underpin quality; and • Limited accommodation in locations of greatest visitor appeal/sensitive landscapes

OPPORTUNITIES	THREATS
• Increase staying visitors and spend; • Target high spending markets; • Extend the season – attract markets that can visit off-peak; • Develop high quality tourism accommodation offers; • Eco accommodation with strong sustainability credentials and minimal environmental impacts; • Accommodation to support the development of 'experiences' such as viticulture, walking, cycling; • More supercottages to cater for multi-generational families and groups; • Pet friendly accommodation; • Wheelchair/ access friendly accommodation; and • Strong interest from accommodation developers in investing in Wealden	• Flooding; • Landscape/ecological constraints; • Permanent residential creep/change of use pressures from higher value uses; • Site availability – competition from higher value planned uses such as residential and employment; • Constraints on accommodation opening undermining viability; • Staffing shortages from Covid-19 and Brexit; • Increased operating costs especially around energy; • Cost of living crisis impacting on disposable income/visitor spend; • Availability and cost of funding; and • Competition from surrounding destinations and rural tourism offers in the wider marketplace

8.1.3 The rationale for developing additional visitor accommodation in Wealden focuses on changing the balance of day and staying visitors, their relative contributions, and broader strategic ambitions for the role that tourism and visitor accommodation should play in the district's economic, social and environmental ambitions. Most notably:

- To gain the greatest economic impact from tourism and with the fewest numbers of visitors, the focus of activity should be about growing staying visitors as a priority;
- Much of the existing visitor accommodation is performing at very high levels of occupancy or are full during the peak summer months and school holidays, requiring additional visitor accommodation development to grow the market;
- There is also some capacity to grow business outside peak periods and fill some of the spare capacity at those times;
- However, some accommodation, notably caravan and camping sites are constrained from operating in the winter months, by planning restrictions despite there being latent demand;
- Also, some alternative types of accommodation will be needed to attract new markets that will travel for different reasons and at different times to level out seasonality peaks, including innovative and emerging visitor accommodation offers, such as glamping and treehouses, and products linked to activities and experiences such as walking and cycling focused lifestyle hotels, with scope to generate new demand;

- The development of high-quality visitor accommodation can also help to maximise spend further;
- Trends in the market nationally are very much in favour of destinations like Wealden that seem to be leading recovery with leisure-led offers and coastal and rural appeal for outdoor activities, wellness and experiences;
- There is strong developer and operator interest in bringing forward new visitor accommodation in Wealden if the main barriers of site availability, funding and planning can be overcome.

8.1.4 This strategy has been articulated to some degree in various plans and research pieces. However, there is an opportunity to further this work should there be an appetite to produce a new **Destination Management Plan (DMP)**. A DMP could help the sector move forward in an integrated and mutually supportive way, with clear target markets and a product development strategy and action plan to meet the needs of these target markets, and indeed attract them. Visitor accommodation development and its delivery should be a core part of that strategy and action plan to take forward the recommendations of this report. The DMP could help to frame the context for planning policies that should support its delivery.

8.1.5 Market potential has been identified for the **accommodation development opportunities** as set out below.

- **Hotels & Other Serviced Accommodation**

- A luxury destination country house hotel, potentially of 5-star standard with spa and associated facilities, if a suitable property with grounds can be found for conversion and expansion;
- A small (c. 40 bedroom) boutique hotel with a fine dining food offer, likely a conversion opportunity in a rural setting;
- A lifestyle hotel, for example an offer that is geared to walking and cycling and particularly serving these type of outdoor markets and is pet friendly;
- Budget hotels in town centres or potentially edge of town/major routeways (i.e. A22 and A27) especially if demand drivers such as business parks are located there;
- New-build pub/restaurants with associated lodge accommodation, on gateway sites along major routeways, on business parks or major housing developments;
- The addition of serviced bedrooms to pubs, including luxury accommodation linked to gastro pubs and fine dining offers;

- The addition of serviced bedrooms to restaurants, wedding venues, activity venues and potentially attractions;
- A 'deconstructed' hotel in a rural/estate setting that combines serviced accommodation and lodges/other non-serviced units with some facilities developed across woodland, parkland and lakeside to provide space for individual immersive experiences;
- The upgrading, expansion and re-positioning of existing hotels and serviced accommodation in line with market expectations and to support their long-term sustainability.
- **Non-Serviced Accommodation**
 - The upgrading and expansion of existing non-serviced accommodation, particularly where it helps to deliver a more viable unit with critical mass and can cater for target markets as identified by the tourism strategy (empty-nesters, families/multi-generational families, special interests such as walking, cycling and viticulture, and people with disabilities);
 - Additional self-catering cottages, including some small complexes with leisure;
 - Supercottages capable of taking large groups of family and friends under one roof (15-20 people), often with associated facilities;
 - Some National Accessible Scheme, including 'access exceptional' self-catering units offering full wheelchair access but also catering for a wider range of mobility and sensory disabilities, which the audit identified a real scarcity of, to cater for growing market with disabilities;
 - Motorhome stopovers, like the French 'aires', that could be on Council owned car parks, in country parks, along seafronts, alongside pubs, or even at visitor attractions;
 - Additional touring caravan and camping provision, including for Clubs such as Caravan & Motorhome Club, that could deliver some glamping and camping pods in addition to pitches for Members;
 - Holiday lodges and eco lodges, in small groups but with potential for mid-scale sites (40-50 units) without leisure, and larger sites (100-150 units) with leisure, if suitable sites could be found;
 - Additional glamping provision of all types, but particularly units that can be let all year (not canvas), plus some unusual and quirky units, including treehouses, and the adoption of a strong sustainability thread in their design, operation and setting;
 - A wellness resort in a rural setting, c. 20 units, with eco-lodges and holistic therapies.

- 8.1.6 The opportunities identified above are not necessarily location-specific, they rather relate to finding **deliverable sites** that can meet the requirements of developers and operators. The coast, the National Park, the High Weald AONB and Ashdown Forest are all features that make Wealden a desirable location for accommodation investment because they drive demand but represent sensitive landscapes/ecological areas that will make it more difficult to develop for visitor accommodation. However, sites in reasonable proximity to these locations could be considered. The optimum locational strategy for the development of visitor accommodation would be to develop accommodation in association with attractions, facilities, farms, estates, pubs, vineyards etc. that already have demand, a built footprint/activity/use on the land and have a base of infrastructure on which to build. At the same time, accommodation can help make that existing facility more viable and sustainable by generating more income. These sites may not be suitable for all visitor accommodation types (or indeed, any dependent on the location), so other sites will likely be required to meet their needs. Those with market fit might be woodlands, reservoirs, large estates and farms, business parks, schools/offices/conference centres in extensive grounds, heritage buildings in countryside locations, roadside sites located close to towns and facilities, country parks, car parks and town centre/regeneration sites. Whilst planning policy directs visitor accommodation uses to town centres initially, the NPPF recognises that sites beyond existing settlements may be required to meet business needs and that sustainable tourism development, which is respectful of the countryside, has a role to play in supporting a prosperous rural economy.
- 8.1.7 The identified market potential is matched with **developer interest** in the table that follows. This interest was identified through a process of soft market testing with national hotel and visitor accommodation developers, investors and operators known to be active in the market. Over 20 companies were contacted and all but 3 responded. Of those, only 2 were not potentially interested in Wealden as a hotel/visitor accommodation investment location – their reasons being the need for a large city centre location for a particular brand, and existing representation. In total, 8 hotel and pub/lodge developers from budget to luxury offers and 8 non-serviced accommodation developers from caravan, camping and glamping developers to ecolodge and wellness resorts developers expressed interest in developing and operating in Wealden district. The table overleaf provides more detail on this interest by type of offer, scale and site requirements.

Table 26

WEALDEN MATCHING DEVELOPER INTEREST & MARKET POTENTIAL			
ACCOMMODATION OFFER	SIZE ROOMS/ UNITS	DEAL	REQUIREMENTS/ COMMENTS
Budget hotel	70-80 room	Potential for Council investment	Roadside and town centre 1-1.5 acres
Mid-scale hotel	100-120 rooms	Franchise or management	Needs public sector support to stack up
4-star hotel	120-150 room	Franchise or management	Conversion
Small boutique hotel	40 room	Franchise or management	Rural setting Conversion
	30-40 room	Freehold	Potentially some cabins Kitchen garden needed
Destination hotel	40-100+ rooms	Freehold or franchise/man agement	Rural setting
Lifestyle hotel	70 room	Lease and manage	Rural setting
New pub/restaurant/lodge	30 room	Freehold	Needs 30k population in 3 miles 1.4 acres
Caravan & Motorhome Club	120 pitch 20 pods/ lodges	Lease	Requires 25 acres
Holiday lodge park (no facilities)	40-50 units	Freehold/ Long leasehold	Requires 5 acres
Holiday lodge park (central facilities)	120-200units	Freehold/ Long leasehold	Requires 40-70 acres
	120 units with leisure	Freehold/ Long leasehold	Requires 15 acres
Eco lodge development	15-40 units	Partnership with landowner Freehold/ Long leasehold	Developer operates
Wellness resort	20-30 units	Partnership with landowner Freehold/ Long leasehold	Strong sustainability credentials. Work with an investor
Eco cabins	6 units	Partnership with landowner Freehold/ Long leasehold	Landowner operates
Treehouse development	7-10 units	Partnership with landowner Freehold/ Long leasehold	Developer operates

8.2 Recommendations

8.2.1 This study was commissioned primarily to inform the emerging Local Plan in terms of potential visitor accommodation need and planning policies, so we turn first to planning recommendations before discussing inward investment actions and wider recommendations to support destination development and sector performance.

Planning Recommendations

8.2.2 The planning response required to facilitate and support the development of the visitor accommodation for which market potential has been identified covers both planning policy and development management. The planning recommendations are as follows:

- The Council's commitment to tourism and overarching support for the growth and development of the sector could start at the top and be firmly embedded in the Local Plan Strategic Objectives potentially with its own objective. This could help to ensure that the economic benefits of tourism are given due weight and consideration, alongside environmental impacts;
- Given the cross-cutting nature of the tourism industry and its implications and impacts, the economic policy of the Local Plan could also make reference to the role of tourism and the Council's positive approach to its development given its significance in a rural district;
- Countryside policies could similarly refer to tourism as a backcloth to where some of the activity and potential accommodation development will want to be. This could cover:
 - Reference to the importance of tourism to the rural economy as acknowledged in this evidence base;
 - Acknowledging, as the NPPF does, that whilst tourism and visitor accommodation (i.e. hotels) is primarily a town centre use, there can be a need for a rural location for accommodation development that the built up areas cannot meet, including sometimes developments of scale, albeit they should respect the character of the countryside;
 - Whilst sustainable travel is important for tourism and visitor accommodation, it should not be seen as a sole reason for the refusal of tourism development in the countryside, which will need to weigh up the economic benefits it brings, especially for smaller schemes that will not generate significant traffic;

- Allowing for well-designed new buildings as well as conversion of existing buildings for tourism purposes;
 - Accepting however that development needs to be sensitive to its surroundings and not have unacceptable impacts on designated landscapes or ecological assets.
- The main sustainable tourism policy could start by setting out the strategy for tourism to be:
 - Year round (subject to other constraints);
 - High quality;
 - High spend/max economic benefit;
 - Sustainable principles and exemplars/contribution to net zero ambitions; and
 - Based on/linked to a DMP and evidence base – which gives a ‘hook’ to hang a planning permission on if there is conflict/tension with the NPPF.
- Could have an overarching statement that positively supports tourism development (subject to meeting other requirements of plan policy);
 - There is no need for a locational strategy to be articulated as currently there are areas of greater restriction within Wealden District such as the Ashdown Forest, Pevensey Levels and High Weald AONB. These policies will be set out elsewhere in the plan in relation to more sensitive landscapes and ecological assets and any tourism schemes would have to meet these higher tests, as would other forms of development;
 - Articulate the type of accommodation that market potential has been identified for and other ambitions (e.g. sustainable design and operations); and
 - Also trends in the market, post covid-19.
- Sustainable visitor accommodation policy – there are 3 main issues to cover:
 - In principle support for sustainable accommodation development:
 - For all types of visitor accommodation that market potential has been identified for, subject to other policy restrictions within the Local Plan.
 - New development and expansion;
 - Allow year-round operation by relaxing seasonal occupancy restrictions (though still have planning conditions to protect from permanent residential use and the amenities of other neighbouring uses); and

- The policy should be flexible to respond to market trends in a dynamic sector.
- Recognising that a rural setting may be required for some types of tourist accommodation to:
 - Support farm diversification/estate planning;
 - Support the diversification of other businesses by adding tourist accommodation;
 - Encourage accommodation where possible to be closely related to/associated with existing attractions and facilities – (e.g. pubs or attractions or facilities adding accommodation that piggy backs off their infrastructure and helps make them more sustainable for the long term);
 - Allow some new build where existing structures may not be enough or the right type of buildings to accommodate tourism accommodation. This could include innovative offers and should be sensitively designed;
 - Use all accommodation development in the countryside as opportunities for visitors to understand the special qualities of the place, and further their sustainability journey – the National Forest Sustainable Tourism Accommodation Guide¹³ an excellent example.
 - Use tourist accommodation to support wider sector opportunities – develop accommodation associated with viticulture, walking and cycling routes, food and drink (pubs, farms), wellness, outdoor activities, dark skies; and
 - Develop staff accommodation on site in rural areas where this is needed.
- Visitor Accommodation Retention policy:
 - Should cover all forms of visitor accommodation;
 - Marketing and viability tests will need to be undertaken and a process set out to allow for loss in circumstances where the use is unviable (this will need to be covered in the Local Plan and potentially embellished in a Supplementary Planning Document (SPD)).

13

<https://www.nationalforest.org/sites/default/files/media/documents/0047%20NFC%20Sustainable%20accommodation%20guide%20v7%20WEB%20ABE25FINAL.pdf>

8.2.3 Other planning actions and considerations coming out of the research and analysis that the Council could undertake are as follows:

- Once a new Local Plan is adopted, the preparation of an SPD covering the detail of guidance for visitor accommodation development, including the retention process referred to above, but which could also include guidance on sustainable tourist accommodation development and more. This detail allows the Council to give more clarity to the market in terms of what it is looking for and how to plan and develop positively.
- Working with landowners to develop whole estate plans where this is needed. This is a process that other local planning authorities have undertaken (including the SDNP), with the benefits of avoiding piecemeal development coming forward, and encouraging integrated thinking about uses, how they can best link together, and their combined impacts.
- New planning conditions (where this can be undertaken) to replace the restrictions on opening, focusing on holiday use only and on record-keeping with annual inspections, plus enforcement where contraventions are reported, subject to Council resources.
- Within the emerging Local Plan (through policy or via supporting text) the Council could consider some of Wealden's major tourist attractions as key tourism sites where development could be focused. This might make it easier to get schemes through the planning process, and encourage the masterplan approach, helping overcome tensions with national policy around tourism development in the countryside.
- There is an opportunity for Wealden District Council to work with neighbouring authorities to have some consistency of approach around some elements of policy-making – visitor accommodation retention is one of these. Several local planning authorities are also working on new Local Plans currently and this could form part of wider duty to cooperate conversations.
- The impacts and control of AirBnb has been a much-discussed issue and was the subject of an All Party Parliamentary Group investigation which reported in 2018. This has recently been picked up again and in June 2022 the Government launched a review into short-term tourist accommodation which is currently calling for evidence. This could lead to a registration 'kitemark' scheme around compliance on safety matters, a self-certification scheme,

and better guidance for operators. Our audit has shown that the majority of Airbnb properties are also promoting themselves on other platforms and so are less under the radar than perhaps when Airbnb was first launched. It does not look likely that there will be any planning implications coming out of this review.

- The monitoring of hotel and visitor accommodation development activity is an important part of understanding the dynamics of the sector and the need or otherwise to respond to this. As discussed in this report, the Council does not currently monitor all visitor accommodation development given that the previous adopted Wealden District Core Strategy Local Plan (February 2013) did not have a formal policy on visitor accommodation development. Where new policies are introduced, we recommend monitoring planning applications across all categories of visitor accommodation through the local planning system to monitor delivery and supply in the short to longer term (including losses).

Inward Investment Response

- 8.2.4 The research for this study has identified interest in the development of hotels and other forms of visitor accommodation, both from existing operators looking to expand, upgrade or re-position, and from developers and operators interested in new-build opportunities. This warmed up interest should be followed up and supported to bring schemes forward in the right locations and help overcome any obstacles identified. These schemes will be at different stages but should be nurtured on an individual basis and lead responsibility allocated for this task.
- 8.2.5 Part of this forward action will be better understanding the site and locational requirements of accommodation developers and operators, and helping to identify sites that could meet these, including being suitable in planning terms. There is an opportunity for the Council to put forward sites in its own ownership that meet these criteria and also potentially for the Council to be more actively engaged through looking at joint ventures, partnerships and investment in hotels and visitor accommodation. This is something many Councils have done to generate an income stream and make best use of their asset base. At the same time there is an opportunity to influence and bring forward wider destination development and regeneration schemes of which accommodation could be a part. Appendix 4 provides some information on hotel schemes in the UK involving public sector investment, but there are also other examples such as BCP (Bournemouth Christchurch and Poole) Council who have invested in and are successfully operating

sleeping beach huts and beach front apartments (<https://www.bournemouthbeachlodges.co.uk/>). There are many lessons to learn from other Councils and most are happy to share their experiences. Getting national accommodation developers into the destination for individual familiarisation visits is the best way to start this process and to get their take on optimum locations as well as opportunities for joint working.

- 8.2.6 Farm and estate diversification is an important strand of policy that the development of visitor accommodation can contribute to. A landowner survey is a good way to try and engage with farms, estates and other landowners. As an example, this has worked well in the National Forest in the Midlands, where over 30 landowners came forward which have been followed up by the Tourism Development Team and their consultancy partners to either help them bring forward suitable schemes themselves or introduce them to partner developers and operators interested in working with landowners. A database would need to be developed for the landowner survey, potentially working with someone like Country Landowners Association (CLA) or the National Farmers Union (NFU). This is different from the 'call for sites' exercise used in planning (where limited approaches have been made for tourism development) and would be targeted purely at tourism development. Engagement with some of the main land agents is also a good route into exploring who might be interested in visitor accommodation development in the district.

Wider Destination Development & Sector Support

- 8.2.7 There are a number of areas where the Council and its partners have an important role to play to help develop the destination and support the sector. These include:
- Continue working with other public sector bodies (most notably, East Sussex County Council) in order to invest in the infrastructure that provides the backcloth to any investment in visitor accommodation, whether that be roads, public realm or walking and cycling routes.
 - The Council is also in a unique position to act as a catalyst and bring together action in relation to initiatives such as the viticulture project, which should not have just a marketing focus, but also a development strand of which visitor accommodation development could be a part.
 - Many of these opportunities are potentially Sussex wide, so co-operation with partners across the two counties should be continued and the opportunities that marketing and development initiatives present, such as those identified

by Blue Sail, should be maximised with visitor accommodation development woven into them.

- Continued marketing and awareness raising will also help build market demand, with a focus on the off-peak season also helping to fill any spare capacity and reduce seasonality.
- The CATI survey and our other interviews with accommodation businesses also identified several areas that visitor accommodation businesses were seeking support from the Council. These are summarised in the table below. Marketing/social media, funding and networking top the list. The 'other' category covered a wide range of support, the most frequently cited being planning help and support, better transport links and rates reductions.

Table 27

THE NEED FOR COUNCIL SUPPORT FOR VISITOR ACCOMMODATION

WEALDEN CATI SURVEY – THE NEED FOR COUNCIL SUPPORT			
	Total	Serviced	Non-serviced
Skills development	5%	8%	2%
Help with recruitment	15%	19%	12%
Marketing/Social media	47%	46%	47%
Financial planning	12%	14%	10%
Business support	22%	19%	24%
Funding	34%	35%	33%
Networking/Communications	35%	22%	45%
Other	30%	30%	31%
None needed	16%	14%	18%

8.3 Concluding Thoughts

8.3.1 With a new Local Plan being progressed, Wealden District Council has a real opportunity to deliver a planning framework that supports tourism and in particular the visitor accommodation sector. Positive planning will be key to future success. The availability and delivery of suitable sites is a barrier to bringing development forward and to some extent is market led and is outside the Council's direct control. However, the potential is clearly there; a proactive approach to inward investment and destination development/marketing coupled with a positive planning approach cannot just make it happen but can accelerate and direct development to maximise the benefits it can bring.