



Market Research

Bucklands Farm Glamping

Bucklands Farm
Brantridge Lane
Balcombe
West Sussex
RH17 6JT

Contents

Project Name.....	1
1.0 Executive Summary	3
2.0 What is Glamping?.....	4
3.0 Tourist Demographic	5
4.0 Key Tourism Markets	7
4.1 Attractions	7
4.2 Walks & Nature	7
4.3 Food and Drink	7
5.0 Visitor Accommodation Analysis	8
6.0 Glamping Popularity	9
7.0 PESTLE Analysis.....	11
7.1 Political	11
7.1.1 Brexit Uncertainty, Covid-19 Impact and Cost of Living Crisis.....	11
7.2 Economic	11
7.2.1 Inflation	11
7.2.2 Cost of Living	11
7.3 Social.....	12
7.3.1 Outdoor Recreation.....	12
7.4 Technological.....	12
7.4.1 Renewable Energy	12
7.4.2 High-Tech Holidays.....	12
7.5 Legal.....	12
7.5.1 Regulations.....	12
7.6 Environmental	12
7.6.1 Environmental Policies	12
8.0 Summary.....	13
9.0 References	14



1.0 Executive Summary

This report is to understand the market for short-term rental accommodation in and around Balcombe to demonstrate the requirement for a 2-unit glamping site at Bucklands Farm.

This report will examine whether current accommodation options local to Balcombe and the surrounding areas are sufficient to meet tourist demand. It will also look at tourism trends to suggest if a new glamping site in this area is warranted. This will demonstrate the need for this glamping development, as well as its potential to benefit the local area economically, socially, and environmentally.

To demonstrate the need for and benefit of this development, this report will focus on the local tourist demographic, key tourism markets in the area, existing visitor accommodation and demand, and recent tourism trends including glamping. This document will be supported by a PESTLE analysis to understand the external environment within which this development will exist and demonstrate the potential for success.

In summarising this report, a clear demand for this development will be determined and its contribution to the area highlighted. This will encapsulate a strong case for the support of this glamping site – Bucklands Farm Glamping.



2.0 What is Glamping?

Combining glamour and camping, glamping is a refreshing way to escape the stresses of daily life and get back to nature. It is a style of camping which typically features larger, more luxurious units such as pods, shepherd huts, bell tents and yurts, as well as amenities not usually associated with camping such as ensuite bathrooms, hot tubs, and heating.

The Oxford Dictionary provides the following definition of glamping: -

glamping

['glampɪŋ] 

NOUN

a form of camping involving accommodation and facilities more luxurious than those associated with traditional camping.

"glamping is likely to satisfy any city slicker seeking a little refuge in nature—without foregoing any of life's luxuries"

Figure 1 – Glamping Definition. Source: Oxford Dictionary.

Providing the luxury of a hotel in the outdoors setting of traditional camping sites, glamping is a great option for the more high-maintenance camper, or those looking to experience a little luxury!



3.0 Tourist Demographic

The Mid Sussex area has a thriving tourism market. The latest figures available were from 2019 and showed the tourism economy of Mid Sussex was valued at over £1.2 Billion with 24.3 million visitors to the county. Tourism also has a large impact on employment in the area with it creating 38,520 jobs. (Business Mid Sussex, 2020) Latest figures from Visit Britain show a per UK-based visitor holiday spend in England of nearly £22,233 million across over 337.3 million nights, breaking down to £66 per night between April and December of 2021. (VisitBritain, 2021)

England total	Q2 2021 (April-June)	Q3 2021 (July-September)	Q4 2021 (October-December)	Q2-Q4 2021 (April-December)
Trips (million)	19.7	43.1	37.4	100.2
Spend (£ million)	£3,807	£10,426	£7,999	£22,233
Nights (million)	69.8	150.2	117.3	337.3

Figure 2 – GB Domestic Overnight Tourism: Latest Results: Source: Visit Britain, 2021

For Bucklands Farm Glamping, industry knowledge tells us that the key tourist demographic will likely be domestic tourists. This is supported by the increasing trend of “staycations” (Shilling, 2021), something which the glamping industry has grown largely as a result of.

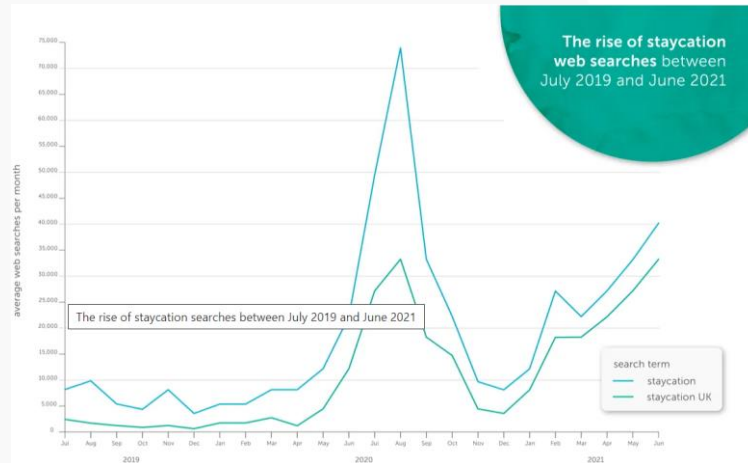


Figure 3 – Rise of Staycations. Source: Shilling, 2021.

This rise has continued, with the share of Britons taking a domestic summer holiday, or 'staycation', in the United Kingdom in 2023 increasing by 50 percent compared to the previous year. According to a survey carried out by Statista.com, 63 percent of the respondents planned a staycation in 2023, whereas about 42 percent of Britons did the same in 2022. (Statista, 2024).

The desire to holiday in the countryside has also risen over the last 5 years, with 25% of people taking a countryside holiday in the last 12 months according to the Association of British Travel Agents.

Top 10 types of holidays taken in the past 12 months (2019 vs 2022)

ABTA Holiday Habits 2022

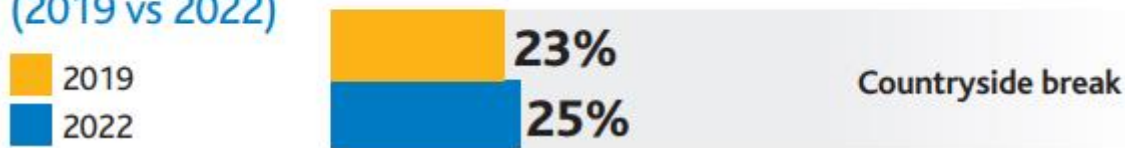


Figure 4 – Types of Trips. Source: ABTA, 2023.

Additionally, those under 35 account for the largest proportion of visitors, with glamping attracting the most affluent visitors (NEC Group, 2022).

Applying evidence-based figures, from current AirBnB listing to the project near Balcombe shows the potentially significant economic impact this proposal has/will have on the local economy. The development will offer up to 8 bed nights per day.

AirBnB shows occupancy rate for 2023/2024 up 4.2% from the previous year, the development allows for an additional 2,044 bed nights per year. This resulted in over **£89,624** per annum of gross earnings, based on the year-end report from AirBnB. Significantly, over the first 10-year period, this development would generate an estimated **£896 thousand** for the local economy.

We strongly believe that the scale of the tourism industry in the region overall demonstrates the demand for visitor accommodation and supporting this development would be a positive step for the Council to take, allowing for more tourist accommodation to be provided in the area and boosting the local economy accordingly.

4.0 Key Tourism Markets

4.1 Attractions

The region is home to a plethora of historic sites and attractions, all within a suitable distance from the proposed glamping site. TripAdvisor lists 1 attraction in Balcombe, this is the Wings Aviation Museum. In the surrounding areas there are several other attractions such as Dillions Vineyard, Ouse Valley Viaduct and Ardingly Reservoir.

Surprisingly, there are only 5 visitor accommodation offerings in Balcombe listed on TripAdvisor. This highlights the capacity for the development of more tourist accommodation to boost visitor numbers to the available attractions.

4.2 Walks & Nature

Within reasonable proximity to the proposed location lay many nature sites and walks for those who wish to explore when visiting the region. Bedelands Nature Reserve and Warnham Local Nature Reserve are both accessible to the proposed site, alongside a plethora of coastal walks and footpaths.

The fact that the site will be located close to the Nymans Gardens means that guests are ideally situated to explore this, as well as the surrounding rural landscape. The natural beauty of the area undoubtedly contributes to the significant visitor numbers previously discussed, and this glamping development will be an excellent opportunity to provide accommodation which further connects visitors to the natural environment.

Some notable nearby walks include Ouse Valley Viaduct & Ardingly Reservoir loop — High Weald AONB, Ardingly Reservoir — Ardingly Activity Centre loop from Balcombe, Infinity archway view — Ouse Valley Viaduct loop from Ardingly and many more.

4.3 Food and Drink

Local highlights for food and drink in the area include The Half Monn Inn, Balcombe Tea Rooms and The Balcombe Club. There are also distilleries nearby — The Custom Spirit Co. and Spirit of the Downs Limited being closest to the proposed site.

Somewhat surprisingly, there does not appear to be a large variety or number of restaurants available. As the glamping units proposed are self-catering, restaurants nearby are not a necessity, though there is no doubt that any restaurants nearby would likely be used by the visitors if available. This will benefit the food and drinks industry in Balcombe.



5.0 Visitor Accommodation Analysis

Below is a list of the 5 closest accommodation options to the proposed glamping site as shown on Google Maps.

- **Sunset Tree Camping**
Website: [Link](#)
Approximate Nightly Cost: No price online
- **Holmsted Himalayas Glamping**
Website: [Link](#)
Approximate Nightly Cost: £75
- **Stay @FL**
Website: [Link](#)
Approximate Nightly Cost: No price online
- **The Ardingly Inn**
Website: [Link](#)
Approximate Nightly Cost: £110
- **Bective Bed & Breakfast**
Website: [Link](#)
Approximate Nightly Cost: No price online

It should also be noted that the closest glamping site to this proposal is Worth Forest Glamping, at 2.7 miles away. However, given the very different type of glamping experience offered here, the huge demand for glamping, and the overall demand for accommodation in the area, it is felt that both sites will be able to thrive. There could also be a hidden benefit to each other through increased promotion and reputation for glamping in the area, and consequent increase in overnight visitors to the area.

It is clear that local accommodation options tend towards B&Bs, Inns, or self-catering accommodation. There are glamping sites identified in the areas surrounding the proposed development, however, these are insufficient to fully maximise the economic benefit of the demand that exists. With glamping's popularity growing ever stronger (catalysed by the COVID 19 pandemic of 2020-2021), we can be confident of large glamping demand to justify Bucklands Farm Glamping.

By comparison to the choices above, the proposed glamping site would be a completely different proposition to the current options and likely attract a new, wider tourist demographic. The site could expect to command upwards of £170 per night per unit, generating an estimated £52,260 annual profit, while creating an additional £134,904 per annum into the Mid Sussex economy annually through visitor spend.

The tourist trade in winter months is naturally low in most parts of the UK. Despite this, based on our experience working on over 600 glamping projects and reviewing demand in winter months, there would still be sufficient demand for a glamping site in the low season, again due to the additional level of comfort and luxury allowed by the proposed style of units.



6.0 Glamping Popularity

Each year we witness an increase in Google searches for glamping (as seen below). While there was an obvious spike during the period where COVID-19 related travel restrictions were in place, we can see that search levels remain generally above the numbers experienced pre-pandemic to date. This trend matches Glampitect's experience of witnessing increasing demand. Interestingly the trend shows increased demand for both peak and off-peak season & shows no sign of decreasing for the time being.

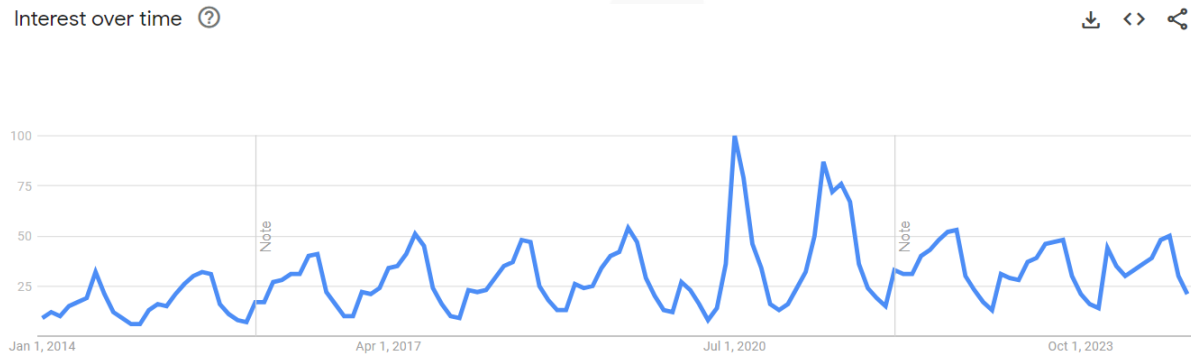


Figure 5 - Glamping Popularity. Source: Google 2024.

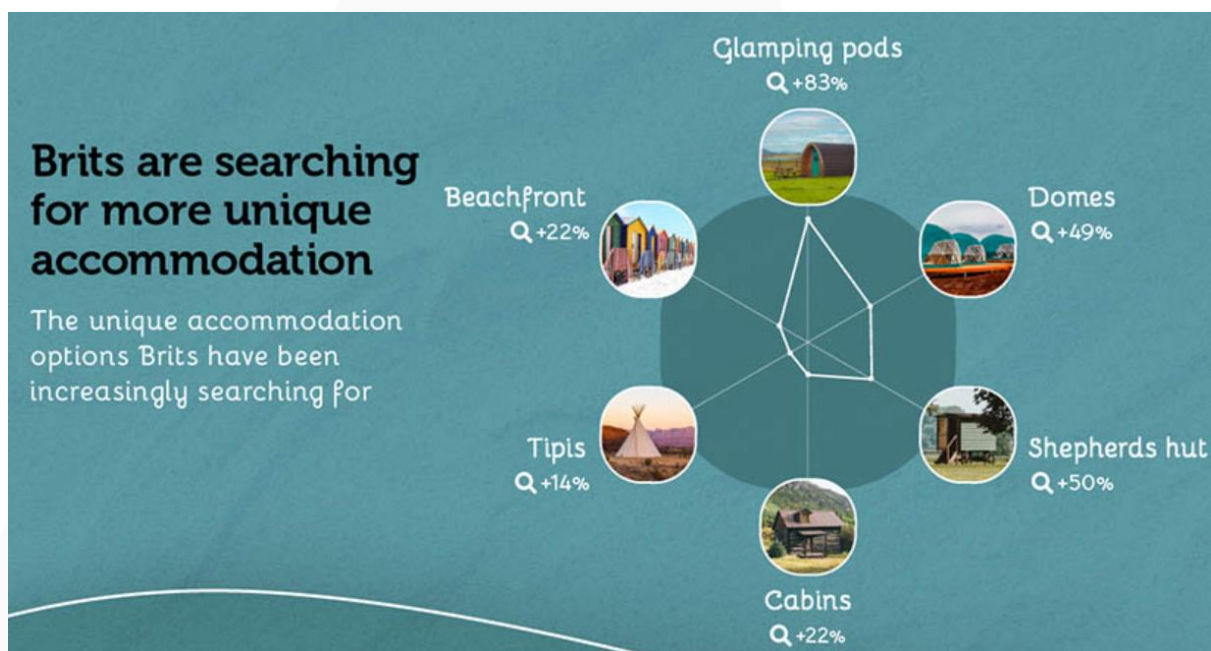


Figure 6 – Staycation Searches 2020-2021. Source: Parkdean Resorts, 2021.

The concept of luxury glamping has been growing massively in popularity in the UK over the past 10 years, with standards and guests' expectations on the rise. Given the popularity of glamping and the need for accommodation in the area, a luxury glamping site would be beneficial. Therefore, we feel the site would provide a positive alternative for visitors to the area and allow the applicants to access a sector of the market that is not yet saturated.

We have seen in other parts of the country that glamping sites are popular even in areas short of tourist attractions, and when close to other glamping options. Furthermore, glamping demands a much higher nightly

rate than camping (Cool Camping, 2021), thus attracting a typically higher average spend and consequently boosting the local economy.



Figure 7 – Glamping Price. Source: Cool Camping, 2021.

Glamping has a certain novelty, meaning it is now an attraction in its own right. The location of this site, whilst being close to plenty of other attractions, will certainly appeal to potential visitors – drawing tourists to the area and benefiting the local economy.

7.0 PESTLE Analysis

A PESTLE analysis is a strategic framework used to identify the external environment in which a business operates. It provides an opportunity to recognise and adapt to factors which could influence the business, positively or negatively.

This PESTLE analysis will analyse the external environment of the proposed development in order to identify opportunities, threats, and influential factors which may impact, positively or negatively, upon the likelihood of success for this business.

7.1 Political

7.1.1 Brexit Uncertainty, Covid-19 Impact and Cost of Living Crisis

Historically, uncertain political times have seen UK-based tourists favour 'staycations' over foreign holidays. The limitations on foreign travel posed by the COVID-19 pandemic led to a boost for the staycation industry, with the love for exploring the British countryside, nature, and other outdoor pursuits that are now so prevalent as a result of lockdown continuing to support this growth and encourage home-based tourism to date.

This is reinforced by data from Verdant Leisure who found that one in three holidaymakers are keen to explore UK countryside getaways, with the most popular holiday destinations for domestic vacations being the coastal areas (Nath.V, 2022 with reference to figures from Verdant Leisure, 2022).

7.2 Economic

7.2.1 Inflation

With inflation sitting at 2.2% (Office for National Statistics, October 2024), many Britons may face tighter financial situations in the coming year. Whilst this could be a threat to tourism, we can see that historically as inflation has risen, so has the staycation trend. Therefore, it is reasonable to conclude that given continuous inflation, staycations will continue to rise accordingly, demonstrating a need for more visitor accommodation and glamping sites in the UK.

7.2.2 Cost of Living

The rising cost of living will also have an impact on holiday intentions. Recent data from ABTA shows that 52% of people chose the more expensive option of a foreign holiday in 2023, with their findings showing that 68% of the population chose to opt for staycations (ABTA 2024). Given these statistics, it is clear that additional luxury accommodation would help Mid Sussex capitalise on these trends.

PERCENTAGE OF PEOPLE TAKING HOLIDAYS IN THE PAST 12 MONTHS 2013 – 2023

■ All holidays
■ UK holidays
■ Holidays abroad

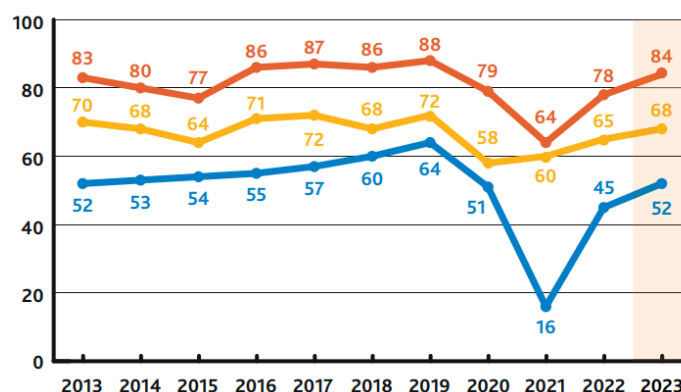


Figure 8 – Holidays in 2023. Source: ABTA 2024.

7.3 Social

7.3.1 Outdoor Recreation

Participation in outdoor recreation has been a significantly growing trend over the last few years. Initially, COVID-19 pushed communities to meet up outdoors and encouraged people to take up new pastimes in the natural environment such as cycling, resulting in the “bike boom” (Muittari, 2021). Running app Strava recorded a significant growth in users since the start of the pandemic (Muittari, 2021), and connecting with nature and participating in sporting activities became higher priorities to many during this time.

This has continued post-Pandemic, with the population now more aware of the benefits these lifestyle changes have brought. Some 27% and 22% of camping and caravanning customers would be encouraged to choose a site that offered nature-spotting tours and stargazing tours, respectively (NEC Group, 2022). 28% of customers are more likely to book a site that offers activities such as adventure sports or fishing (NEC Group, 2022). Glamping provides a great opportunity to connect this trend with visitor accommodation in your area, giving tourists a real connection to the natural environment in which they are staying.

7.4 Technological

7.4.1 Renewable Energy

With growing concerns over climate change, the need for and use of renewable energy is more important than ever. This development acknowledges the benefits of renewable energy and will utilise solar power to supplement the energy requirement at the site. In doing so, the applicant has identified a technological factor within the external environment and created an opportunity to better their future glamping business.

7.4.2 High-Tech Holidays

At [Glampitect](#) we have seen an increased number of applications and glamping guests who are seeking to visit and establish sites which offer a high-tech glamping experience. Noting this, the applicant to provide an online booking platform and website to make the booking experience easy and accessible to guests.

7.5 Legal

7.5.1 Regulations

As is the case with any development or new business, there are many regulations which must be adhered to. In this case, the applicant recognises this and has enlisted the assistance of glamping experts [Glampitect](#) to ensure that all legalities are met and that the future glamping business abides by all relevant regulations.

7.6 Environmental

7.6.1 Environmental Policies

We recognise the importance of the natural environment in Balcombe and have closely examined the policies that Mid Sussex Council considers against planning applications to maintain this landscape amenity. As glamping units require minimal excavation, physical landscape damage is typically very minimal with this kind of development. In addition to this, at [Glampitect](#) we take great care in the design process to ensure that our projects protect and enhance the environment around them.



8.0 Summary

As identified within this report, Mid Sussex experience large numbers of visitors, the majority of whom are domestic tourists taking advantage of the staycation trend.

The key tourism markets which draw visitors to Balcombe are attractions, walks and nature, and food and drink. However, it has also been noted that the food and drink market remains relatively small in comparison to others, and the addition of this development will provide the opportunity for growth within the industry.

Existing accommodation in the area was examined, and a clear gap in the market for glamping development has been identified. Bucklands Farm Glamping will fill this gap and increase the available accommodation offering in the area, thereby contributing an estimated £134,904 per annum to the local economy.

Glamping is an indisputably accelerating trend within the UK and one which is likely to increase with the continuous impact of Covid-19. Demanding a higher nightly rate than traditional camping and most nearby hotels, it will be an excellent way to diversify accommodation offerings within Balcombe and boost the nightly rate in the area.

Finally, having conducted a PESTLE analysis, multiple opportunities have been identified for this development, including Covid-19 and Brexit, inflation as a driver for staycations, the growing trend of outdoor recreation, and renewable energy. Many factors which would typically impact negatively upon a business's success will likely impact positively upon this development, making glamping an excellent venture.

It has been demonstrated that the proposed development will boost the local and rural economy and offer a desirable accommodation style for visitors. Therefore, we are confident that Bucklands Farm Glamping will be beneficial to Balcombe economically, socially, and environmentally.



9.0 References

ABTA, 2023. *ABTA Holiday Habits, 2023*. Available at: [ABTA Holiday Habits \(ABTA.com\)](https://www.abta.com/holiday-habits)

Nath, V. 2022. *Top five reasons for expected Staycation boom in 2023*. Available at: [Top five reasons for expected Staycation boom in 2023 – TravelDailyMedia.com](https://www.traveldailymedia.com/top-five-reasons-for-expected-staycation-boom-in-2023/)

Muittari, J. 2021. *How the Covid-19 Pandemic Has Increased the Need for Outdoor Sports Services*. Available at: [How COVID Has Increased the Need for Outdoor Sports Services - Humak](https://www.humak.fi/en/2021/05/how-covid-19-pandemic-has-increased-the-need-for-outdoor-sports-services/)

NEC Group. 2022. Research conducted and shared with Glampitect.

Office for National Statistics. 2024. *Inflation and price indices*. Available at: [Inflation and price indices - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/economy/priceindices)

Parkdean Resorts. 2021. *Staycation Market Report 2021*. Available at: [Staycation Market Report 2021 | Parkdean Resorts](https://www.parkdeanresorts.co.uk/staycation-market-report-2021/)

Shilling, C. 2021. *The UK staycation boom – What are people searching for?* Available at: [UK staycation search trends revealed \(simplybusiness.co.uk\)](https://www.simplybusiness.co.uk/news/uk-staycation-search-trends-revealed/)

Thomas, D. 2021. *UK wage growth lags rising cost of living*. Available at: [UK wage growth lags rising cost of living - BBC News](https://www.bbc.com/news/health-58111111)

NISRA, 2020. *Overnight Tourism Statistics 2019 Ards and North Down Local Government District*. Available at: [Overnight Tourism Statistics](https://www.nisra.gov.uk/publications/overnight-tourism-statistics-2019)

Visit Britain, 2024. *Great Britain domestic overnight trips 2023*. Available at: [Overnight Tourism Statistics](https://www.visitbritain.org/overnight-tourism-statistics)

