



Market Research

Tower Hill Glamping

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Tower Hill

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1.0 Executive Summary

This report is to understand the market for short-term rental accommodation in and around Horsham to demonstrate the requirement for a 5-unit glamping site at Tower Hill Glamping.

This report will examine whether current accommodation options local to Horsham 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. A PESTLE analysis will support this document in understanding 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 – Tower Hill 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 outdoor 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 West Sussex area has a thriving tourism market. The latest figures available were from 2019 and showed the tourism economy of West 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 West 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 Tower Hill 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.

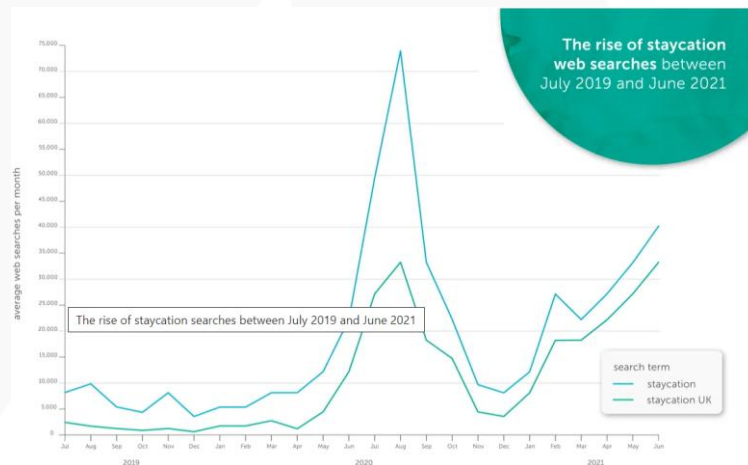


Figure 3 – Rise of Staycations. Source: Shilling, 2021.

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% compared to the previous year. According to a survey carried out by Statista.com, 63% of the respondents planned a staycation in 2023, whereas about 42% 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

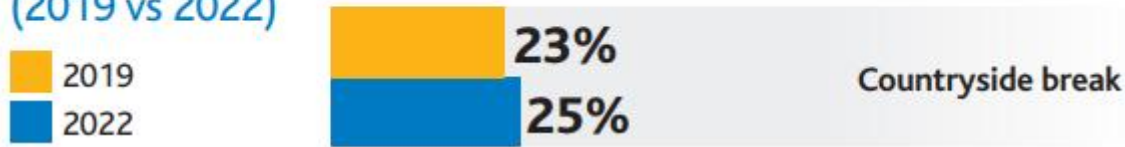


Figure 4 – Types of Trip. Source: ABTA, 2023.

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

Applying these figures to the project near Horsham shows the potentially significant economic impact this proposal will have on the local economy. The development will offer 20 bed nights per day. Assuming a 70% occupancy rate, the development will allow for an additional 5,110 bed nights per year. This would account for over **£337,260** per annum of expenditure in Horsham, based on a £66 spend per night as shown in Figure 2. Significantly, over the first 10-year period, this development would generate an estimated **£3.4 million** for the local economy.

Although statistics specific to Horsham are not available at present, 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 79 attractions in Horsham, ranging from gardens and historic sites to breweries and art galleries. Top attractions in Horsham include Huxleys Birds of Prey Centre and Gardens, Sumners Pond, Kissingate Brewery and the Horsham Museum & Art Gallery. There are also unique and fun attractions for guests such as the Major Mindgames escape rooms and Holmbush Paintball.

Surprisingly, there are only 31 visitor accommodation offerings in Horsham 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. Warnham Local Nature Reserve and Harwood Ponds are both accessible to the proposed site, alongside a plethora of coastal walks and footpaths. Hiking areas in the area include Muggeridge Field, Denne Hill, Sharpenhurst.

There are also Horsham Park and Leonardslee Lakes and Gardens, both popular gardens in the area for guests to visit. 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.

4.3 Food and Drink

Local highlights for food and drink in the area include Filippas Italian Restaurant, Boars Head, and The Green Man. There are also distilleries nearby – Cabin Pressure Spirits Ltd Distillery and The Surrey Copper Distillery Limited which are 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 Horsham.



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.

- **Random Hall**
Website: [Link](#)
Approximate Nightly Cost: £150
- **Magpies Bed & Breakfast**
Website: [Link](#)
Approximate Nightly Cost: £130
- **The Red Lyon**
Website: [Link](#)
Approximate Nightly Cost: £120
- **Feather Down Canfields**
Website: [Link](#)
Approximate Nightly Cost: £231
- **The Coach House**
Website: [Link](#)
Approximate Nightly Cost: £110

It should also be noted that the closest glamping site to this proposal is the previously mentioned Feather Down Canfields at 9.1 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 or hotels. 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, we can be confident of large glamping demand to justify Tower Hill 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 £185 per night per unit, generating an estimated £159,975 annual profit, while creating an additional £337,260 per annum into the Horsham District economy annually through visitor spend.

The tourist trade in winter months is naturally lower across the UK. Despite this, based on our experience working on over 600 glamping projects throughout the UK and Ireland, and reviewing demand in winter months, there would still be sufficient demand for a glamping site in 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 when 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.

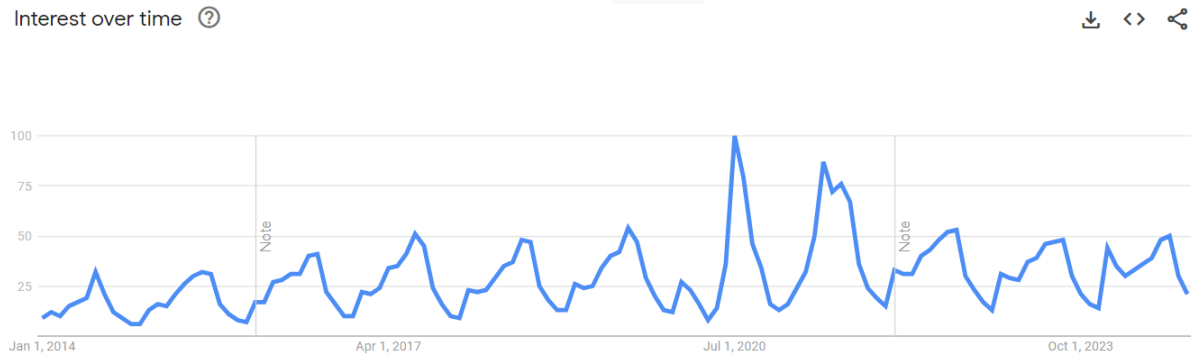


Figure 5 - Glamping Popularity. Source: Google 2024.

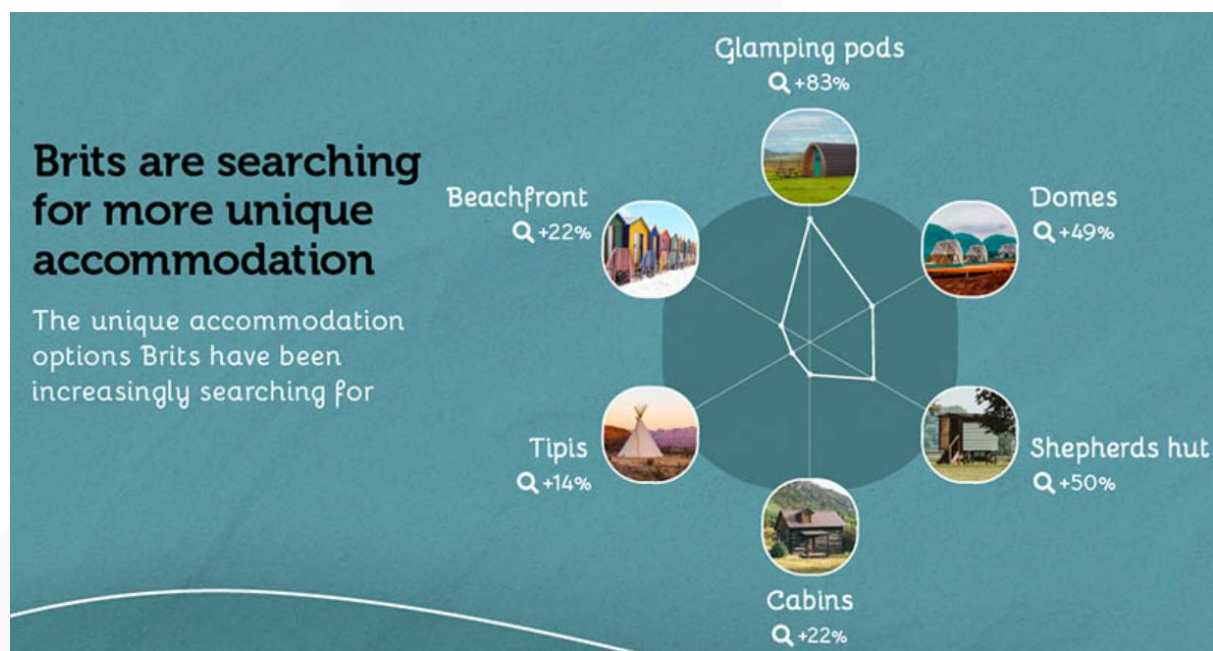


Figure 6 – Staycation Searches 2020-2021. Source: Parkdean Resorts, 2021.

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 to identify opportunities, threats, and influential factors which may impact, positively or negatively, 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 which 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 3.9% (Office for National Statistics, January 2025), 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 Horsham District capitalise on these trends.

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

■ All holidays
■ UK holidays
■ Holidays abroad

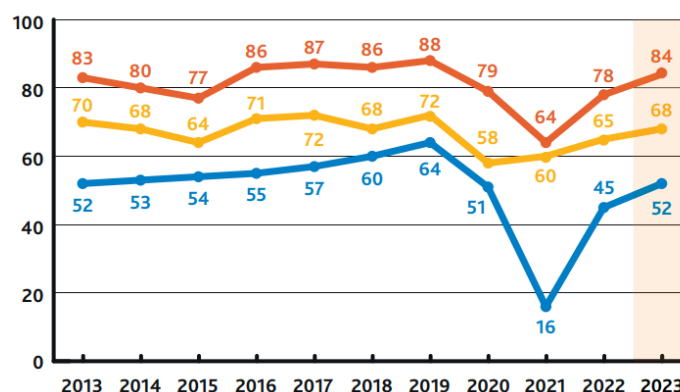


Figure 8 – Holidays in 2023. Source: ABTA 2024.

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 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 intends to meet this trend by including TVs and Wi-Fi in each unit to give guests a more luxurious experience.

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 Horsham and have closely examined the policies that the Horsham District 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, the Horsham District experiences 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 Horsham 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. Tower Hill Glamping will fill this gap and increase the available accommodation offering in the area, thereby contributing an estimated £337,260 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 Horsham 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 Tower Hill Glamping will be beneficial to Horsham economically, socially, and environmentally.



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