Eastbourne Accommodation Study
Appendix I - Accommodation Audit

1.1 Introduction

Contents

Introduction

1. This Interim Report forms part of a project undertaken on behalf of Eastbourne Borough Council in the first half of 2024. The study provides up-to-date evidence on tourist accommodation to support the preparation of the new Local Plan.

2. The objective of the study is to assess the current supply and demand for hotel and visitor accommodation in Eastbourne and how this has changed over recent years. Detailed terms of reference include assessment of:
   - the impacts of the COVID-19 pandemic and changing visitor behaviour on the market for tourist accommodation in Eastbourne;
   - the impacts of the growth of OTA's on the tourist accommodation market and the growth of short-term holiday lets and sharing economy platforms such as 'Airbnb'
   - the potential for growth or reduction in demand for accommodation;
   - the scope for investment in the accommodation offer in the town; and
   - the scale of the problem in terms of loss of accommodation stock and the pressure for residential conversion.

3. The Report provides a quantitative assessment of all types of tourist accommodation in the town. It maps these assets in different ways and scales and uses a variety of other data to explore the demand side. It also provides summaries of a range of survey and interview data gathered as part of the discovery stage. The detailed survey is reported in a separate document which can be read in conjunction with this Report.

4. The study area relates to the town of Eastbourne that is under the authority of the Council in planning terms, hence It does not include the area of the Borough that is within the South Downs National Park. The size of the study area is $26km^2$ ($10.1m^2$).

5. The economic context in which this report has been prepared has been very challenging for hospitality businesses. The cost of living crisis has significantly reduced demand and comes on the back of an already severely weakened sector due to the COVID-19 crisis. Reduced demand for staying visitors has combined with much higher input costs and a banking sector that has deferred its financial support for hospitality businesses. (Hotels are often much more capital intensive than other parts of the visitor economy such as bars and restaurants). Investment in hotel stock and the town's public realm has not kept up with requirements, quality has suffered and prices have fallen. Other social issues have come into play which has further impacted on competitiveness.

6. The supply side trends explained in detail in this report have been perceived to exacerbate this unhelpful context and there certainly has been a huge shift from serviced to non-serviced categories over the last decade, a trend which is here to stay. Despite this room numbers have remained largely the same but falling demand and many micro-providers may have given the impression of lots of additional supply.

7. Any corrections, updates and comments on this document are welcome and will be incorporated to produce a definitive final reference listing. This will be provided as a printed reference document, a spreadsheet and an online app enabling detailed interrogation of the full asset base. The mapping app. can be accessed from this link.

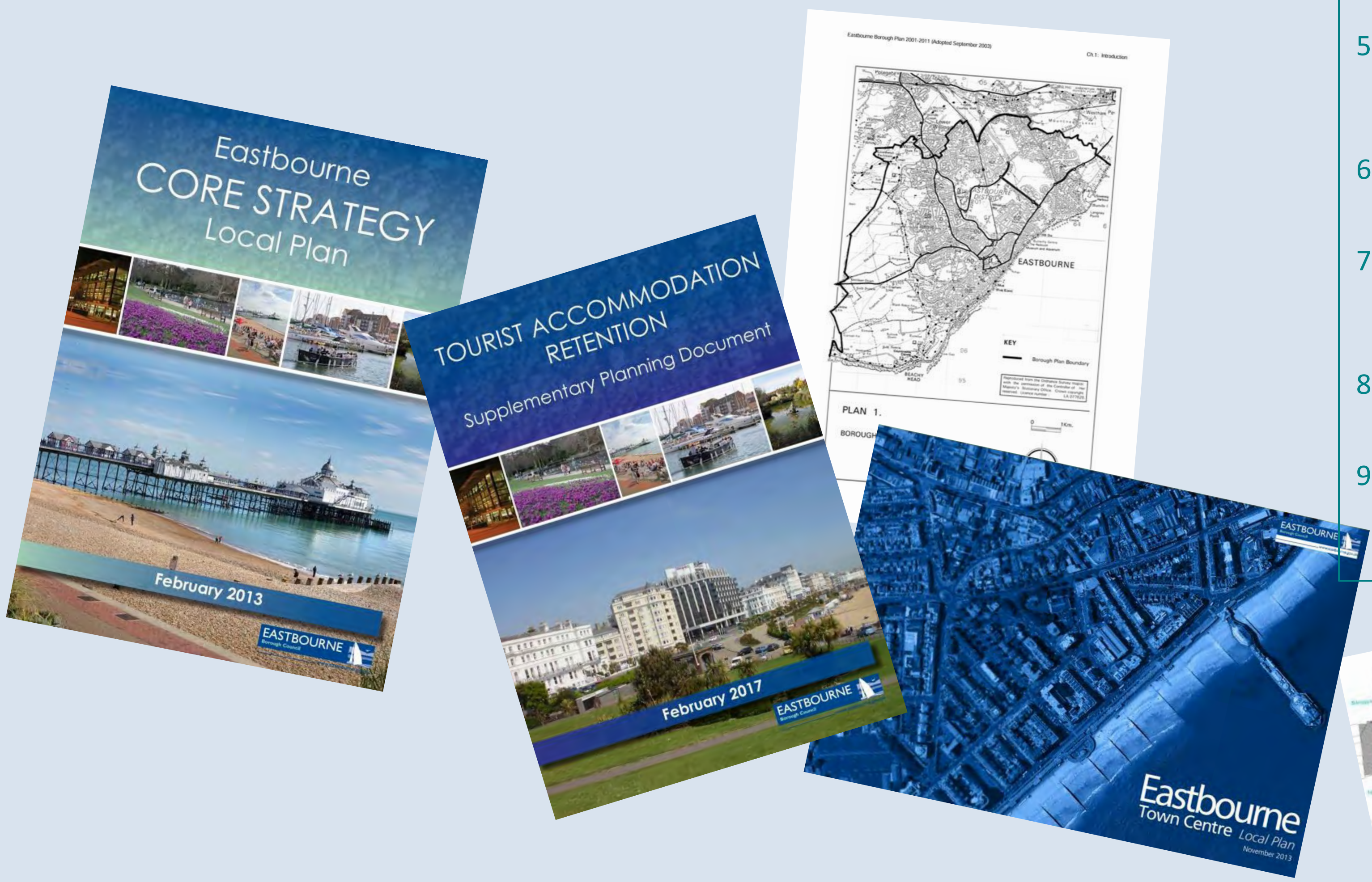
1.2 Policy Framework – Review & Planning Impacts

Policy Review

1. The Eastbourne Core Strategy (2013) identifies the 'retention of existing holiday accommodation' as a Key Spatial Objective (Key Spatial Objective 5: Tourism) together with policy D3 (Tourism and Culture) which seeks to 'resist the loss of visitor accommodation through the retention of a tourist accommodation area and protection policy'. This is reinforced through TO2 of the Eastbourne Borough Plan 2003, which states that:

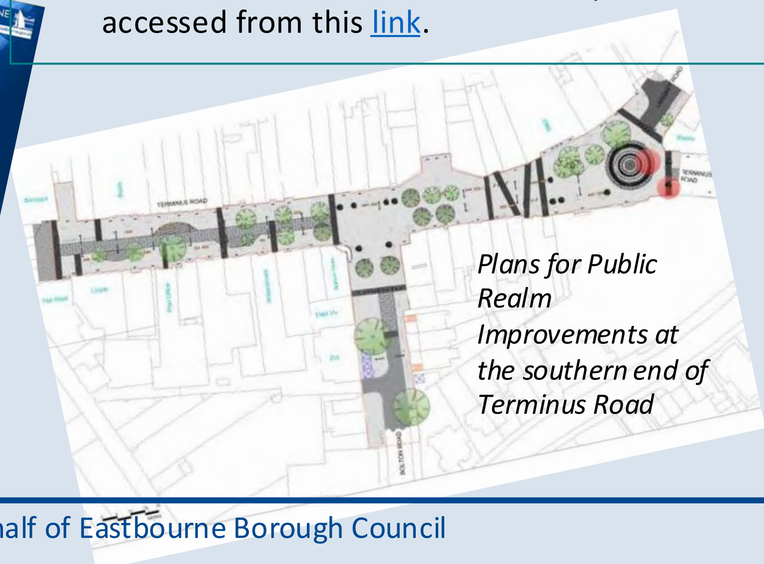
   "Within the tourist accommodation area identified on the Proposal Map planning permission will not be granted for the redevelopment or change of use of tourist accommodation to any other use….only in exceptional circumstance will planning permission be granted for any other use, this means that the applicant must demonstrate that the continuing use of the land as tourist accommodation is not viable."

2. Further, TO1 of the Eastbourne Borough Plan 2003 seeks to resist inappropriate uses within the identified Tourist Accommodation Area.
3. The SPD 'Tourist Accommodation Retention SPD2017' details on how the aforementioned policies (T01, TO2 and D3) should be interpreted.
4. Thus, it can be seen that the Council does have an appropriate range of policies within their development plan to protect tourist accommodation stock.



Planning Impacts

1. An analysis has been made of the last 5 years of Eastbourne planning history relating to C1 sites (See Appendix III). There have been some very modest gains from recent decisions relating to isolated developments in the TAA. However, applications have predominantly proposed a reduction in C1 floorspace and the majority have been approved. These have been a mixture of partial and total loss of the hotel and virtually all have proposed a change of use from C1 to C3.
2. Most applications have been sited in the Secondary Zone of the TAA. The principle has generally been accepted with consideration of the Tourist Accommodation Retention (TAR) SPD, which supports a gradual loss of visitor accommodation in this zone in order to reinforce the viability of the TAA overall. The LPA have also readily acknowledged the relevance of 11d) of the NPPF in these decisions. For some applications a reduction in hotel size was considered to be an 'improvement' (in accordance with the SPD) as the remaining hotels would become more viable.
3. The most significant approved loss in the Secondary Zone was for ~48no rooms (220579). The officer report is unavailable, though it is noted that the applicant submitted economic data indicating that the site was no longer viable. The proposal was for C3 and 12no holiday let flats. The second largest loss (200280) was approved at committee and retained most of the hotel.
4. Refusals/dismissed appeals in the Secondary Zone were 2no HMO applications (during the COVID-19 lock downs) which the LPA/Inspector found to be an incompatible use for within the TAA (as per SPD and HO14). The loss of hotel, though, was accepted with consideration of the SPD.
5. Only 3no relevant applications were approved within the Primary Zone. For 2no of these (220012, 220870) it was accepted that the principle for loss of hotel at the site had already been established by previous decisions.
6. The only other relevant approval in the Primary Zone (190665 - committee) was from 2019 and was accepted as unviable, including that the C1 use was abandoned due to prolonged vacancy.
7. Regarding the only prominent refusal in the Primary Zone (210711), the LPA objected to the loss of a hotel in a primary position and, further, found that the marketing evidence requirements had not been met (in conflict with TO2 and D3).
8. Applications outside of the TAA have been accepted in the absence of a policy resisting loss of tourist accommodation outside of TAA.
9. A study relating to HMOs by AECOM on behalf of the Borough Council has also been undertaken in 2024. This covers the relationship between HMOs, hotels and the tourism sector and can be accessed from this link.



Plans for Public Realm Improvements at the southern end of Terminus Road

2.1. Assessment of Regional Market & Analysis of post COVID-19 Trends

UK Domestic Tourism Trends

1. The volume of domestic holidays is estimated to have fallen 5% in 2023. The domestic tourism market has been returning towards pre-COVID-19 levels of consumer demand over the past two years but now faces further challenges from the cost-of-living crisis and a bounce-back in overseas holidays.
2. The percentage of adults who took a UK holiday in the year ending October 2023 rose to 57%, up eight percent since August 2022, marking a return to pre-COVID-19 levels of consumer penetration.
3. The cost-of-living crisis is having contradictory impacts on domestic tourism. Many consumers are reducing their frequency of travel and holiday spend or choosing cheaper accommodation. At the same time, 29% of UK holidaymakers are opting for a budget staycation instead of going abroad. However, domestic tourism faces renewed competition from a recovering post-COVID-19 overseas holiday market. Consumers who are less affected by the cost-of-living crisis are opting for trips abroad in greater numbers than at any time since 2019.
4. The domestic market has a growing appeal to higher spending consumers. Premium holiday cottages, wellness, luxury breaks and special event celebrations are areas of big future potential.

Hotel Trends

1. 50% of UK adults stayed in a hotel in the UK in the year to September 2023, down from 55% in the previous year and around 11% below the 2019 level. One of the contributing factors is that fewer Brits took domestic trips, partly driven by the greater confidence in travelling abroad and the higher cost of living. Spend on stays in UK hotels is estimated to have increased by 11% in 2023, reaching £22.1 billion, 9% more than in 2019.
2. The market is also challenged by increased competition from the holiday rental property segment, which significantly increased its customer base during the pandemic. 19% of UK adults stayed in such accommodation in 2023, about 1.5 times more than before the pandemic.
3. More than half of hotel guests used a third-party channel to book their last UK hotel stay.
4. The share of Brits that stayed in a chain or independent hotel in the year to September 2023 was about 91% and 83% of pre-pandemic levels respectively. The financial strength and resources of hotel chains have likely made them better able to cope than independent hotels with the pressures arising from the pandemic and cost of living crisis.

Holiday Rental Market Trends

1. Following the easing of COVID-19 restrictions, holiday rental properties proved more resilient than most other forms of accommodation and as a result, the pandemic has increased the segment's client base.
2. Holiday rental properties continue to show the highest growth potential of any accommodation type. The segment is benefiting from a larger pool of new customers as a result of holidaymakers wanting more personal space during the pandemic, while its affordable image and self-catering facilities help it to appeal amid the rising cost of living.
3. In the past three years, 20% of users stayed in a rental house or cottage, 12% stayed in a rental apartment or flat, and 3% stayed in a rented room. City-based apartments are expected to grow at a slower pace as consumers prioritise their main holiday and cut back on 'top-up breaks'.
4. Usage of holiday rental properties is currently highest among 16-44 year-olds. However, the rising population of older adults represents a big opportunity to the holiday rental property market.
5. Imminent regulatory changes[1] will enable governments to better manage the holiday rental property market. This should help to address some consumer concerns about staying in such accommodation, but could also affect the willingness or ability of hosts to rent out their property.

UK Domestic Tourism Trends

2023-24
- Domestic tourism value decreases by 4%
- Market faces double challenge from cost of living crisis and post-COVID-19 revival of overseas holidays

2024-25
- Volume and value expected to return to growth as cost of living crisis recedes and trip frequency increases

2026-28
- Pace of growth to increase in real terms
- Value growth led by premium sectors (e.g. holiday cottages, luxury hotels, wellness breaks)
- Climate-induced staycation trend likely

Adapted from Mintel 2023

UK Hotel Trends

2023-24
- Value of hotel market expected to reach record highs, while volume remains below pre-pandemic levels
- Challenges: inflation; slow recovery in business travel; competition from holiday rental properties

2024-25
- More stable economic climate good for travel budgets
- Higher cost of holidays will dampen the appeal of 1-3 night breaks

2026-28
- Opportunity to strengthen position among older demographic
- Innovations around sustainability essential to future growth

UK Holiday Rental Market Trends

2023-24
- Holiday rental properties expected to outperform overall domestic holiday market despite economic crisis

2024-25
- Potential to grow even more once economy stabilises
- New regulations could increase consumer confidence in booking but may negatively impact no. of listings

2026-28
- Holidays expected to remain a consumer priority, benefitting holiday rental properties
- Innovations around sustainability essential to growth

Notes:

1. The new regulations include a new planning class for short-term rentals with a full-time holiday let likely to be reclassified as planning class C5, policy that will see holiday let properties require planning permission from the local authority, as well as the introduction of a national register for short-term lets from summer 2024, and the abolition of the furnished holiday lettings regime (tax relief for owners of FHLs) from April 2025.

2.2 The Volume & Value of Tourism to Eastbourne

Figure 1. Counties League Table - Tourism Spend

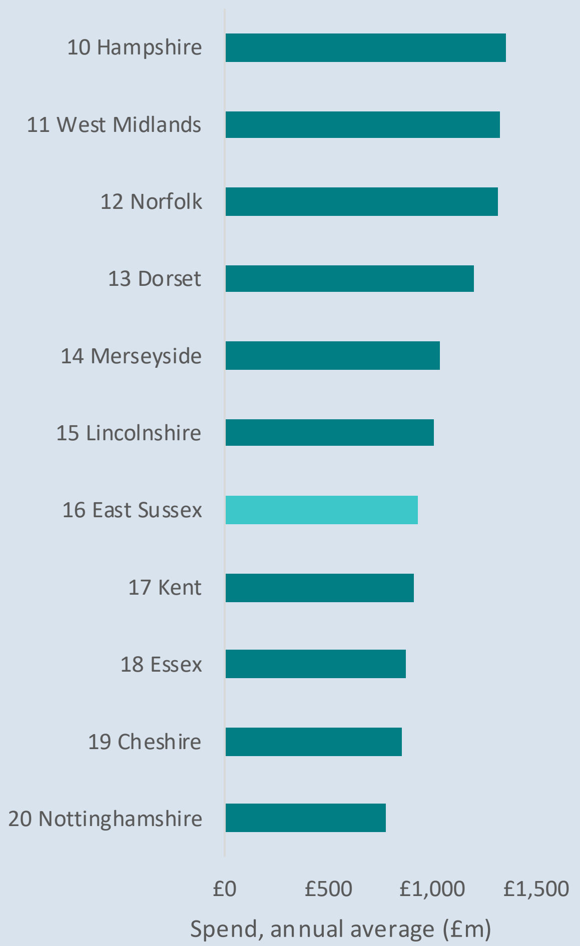


Figure 3. Domestic Overnight Tourism to Seaside LAs - Volume

Figure 4. Domestic Overnight Tourism to Seaside LAs – Spend per Night

1. East Sussex is ranked 19th in domestic arrivals and 16th in overnight domestic tourism spending out of 48 in the national league table (Figure 1). This reflects well on the County's offer, suggesting that the quantity and type of attractions and serviced accommodation is appropriate to the market.
2. Eastbourne ranks below average for the County in overnight volume, number of nights and overnight spend from domestic tourism (Figure 2 and table below for quant.).
3. As comparable destinations in terms of size and seaside location, Bournemouth, Brighton and Hove, Hastings and Portsmouth see higher volume of total visits and nights spent. However, spend per night is higher in Eastbourne (Figure 3 & 4).
4. The volume of overseas visitors to Eastbourne has fallen dramatically since COVID-19 (Figure 5). In 2022, Germany and the Netherlands remain key markets although significantly reduced. The data suggests the emergence of new markets including Denmark, Greece and Norway, while visitors from China have almost disappeared, reflecting a national trend.
5. The market review on the next page identified Spain, France and USA as the main source of international visitors to Eastbourne in 2023.

Staying Visits		Visits (m)	Nights (m)	Spend (£m)
	Domestic	0.4	1.1	95
	Overseas	0.045	0.386	27
	Total	*0.5*	*1.5*	*121.6*
Day visits		**3.7**		**144**
Total visits		**4.2**		**266**

Figure 2. Domestic Overnight Tourism to East Sussex – Spend per Night

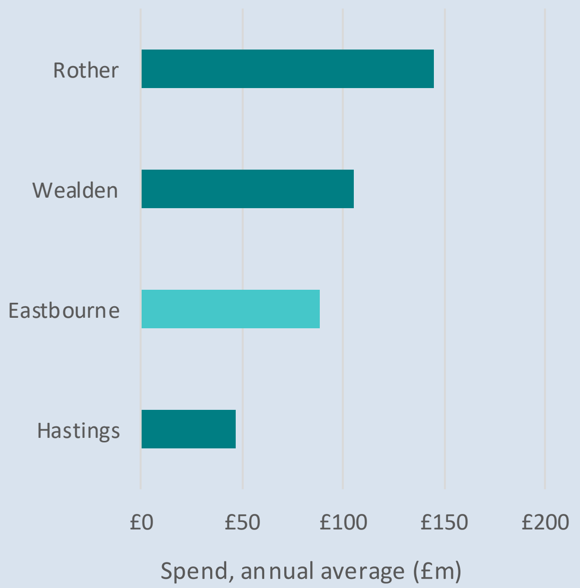
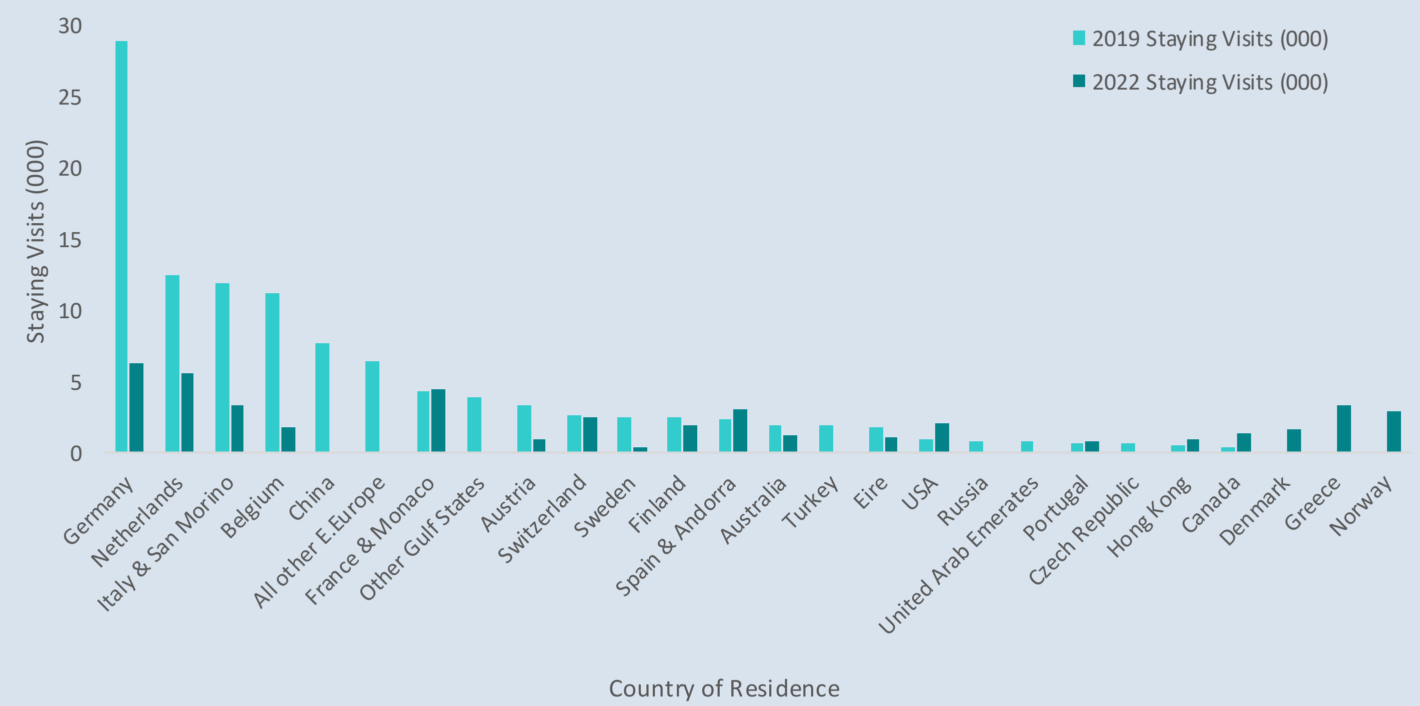


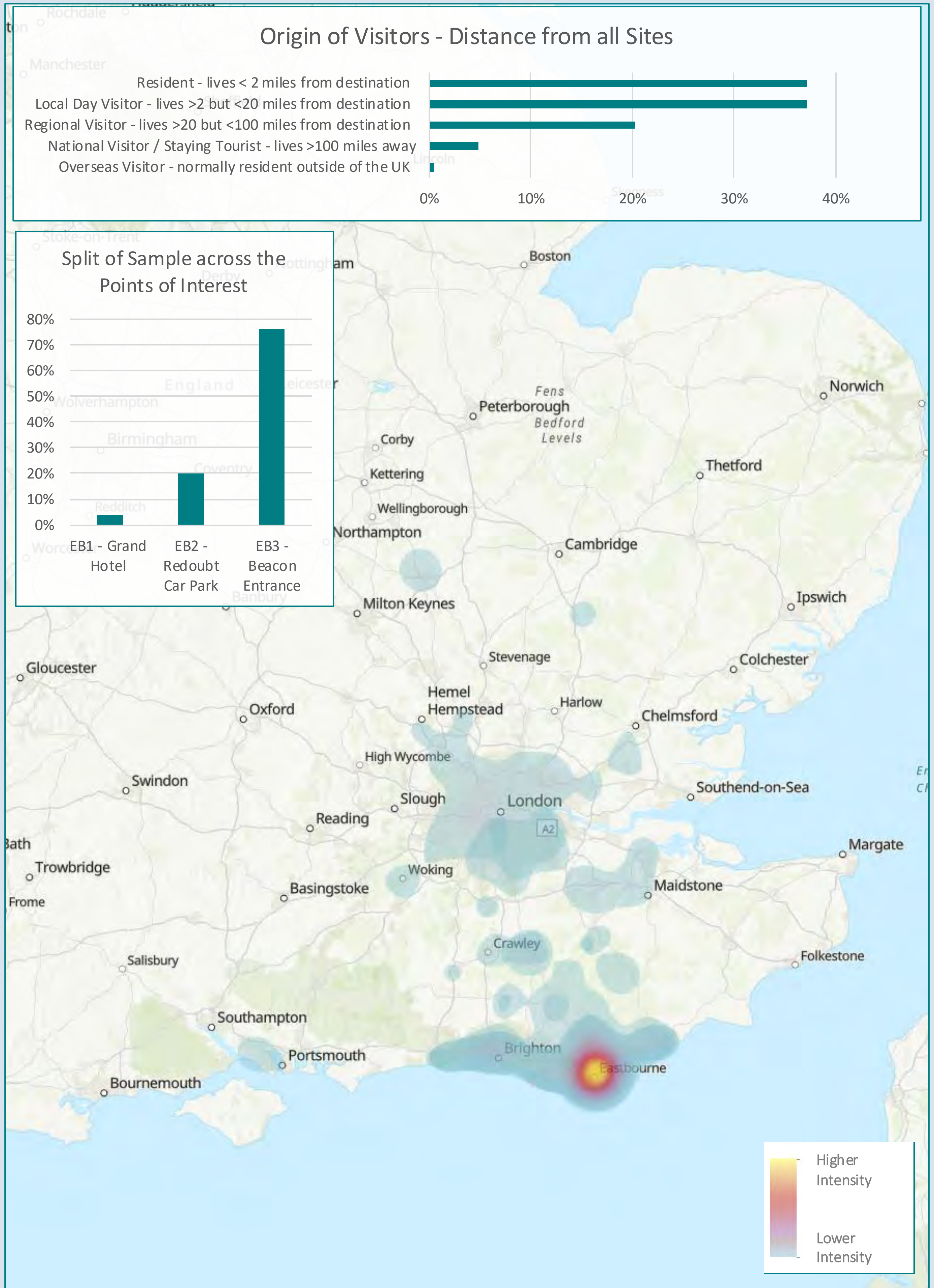
Figure 5. Overseas Visitors to Eastbourne 2019 - 2022



Notes:

1. Figure 1 & 2: VisitBritain (2023) Great Britain Tourism Survey & Great Britain Leisure Day Visits Survey. Total Tourism Visits: Day Visits and All overnight tourism combined.
2. Figure 3 & 4: VisitBritain (2023) Great Britain Tourism Survey. Lewes has not been included due to low sample size not sufficient for analysis.
3. The domestic data are two year average of trips taken with the baseline considered from 2021-2023. Such an average helps with robustness given small sample sizes.
4. Figure 5: ONS (2022) International Passenger Survey
5. Table above 2023 – drawn from sources noted above.

3.1 Market Review - Introduction



Overseas Markets

Country	% Share	EB v. ENG
ESP	15.9%	8.2%
FRA	15.9%	5.1%
USA	12.6%	-5.0%
ITA	6.6%	1.5%
DEU	5.5%	-3.1%
NLD	5.5%	-0.8%
CHE	3.3%	0.0%
SAU	3.3%	3.0%
BEL	2.7%	0.1%
MEX	2.2%	1.9%
POL	2.2%	-3.0%
SGP	2.2%	1.8%
THA	2.2%	1.9%
HKG	2.2%	1.8%
AUS	1.6%	-1.1%
NZL	1.6%	1.2%
CAN	1.1%	-2.3%
CZE	1.1%	-0.2%
FIN	1.1%	0.4%
IRL	1.1%	-8.5%
JPN	1.1%	0.7%
RUS	1.1%	0.9%
ARE	0.5%	-0.3%
AUT	0.5%	-0.6%
BRA	0.5%	0.0%
CYP	0.5%	-0.6%
EGY	0.5%	0.5%
GIB	0.5%	-0.6%
HUN	0.5%	-0.1%
MDA	0.5%	No IPS data
PHL	0.5%	No IPS data
PRT	0.5%	-0.6%
TUR	0.5%	0.0%
UKR	0.5%	No IPS data
ZAF	0.5%	-0.2%
LVA	0.5%	No IPS data

1. This section analyses the home location of mobile phones and other devices, (and the anonymized visitors that carry them), at three locations in Eastbourne. The sample data relates to trips taken in 2023 to The Beacon shopping centre, the lobby of the Grand Hotel, and Redoubt Car Park on the seafront. These venues were selected as being broadly reflective of residential, staying visitor and domestic day visitor markets. The dataset does not reflect total trips but a sample size of over 35,000 makes the findings accurate. The Beacon's larger sample indicates higher footfall, reflecting its popularity as a retail, food, drink and entertainment venue.

2. Residents, defined as people living within two miles of any site, are also included in the analysis. However nearby residents may be under-reported in the data [1] as they are less likely to use apps (such as mapping) while away from home.

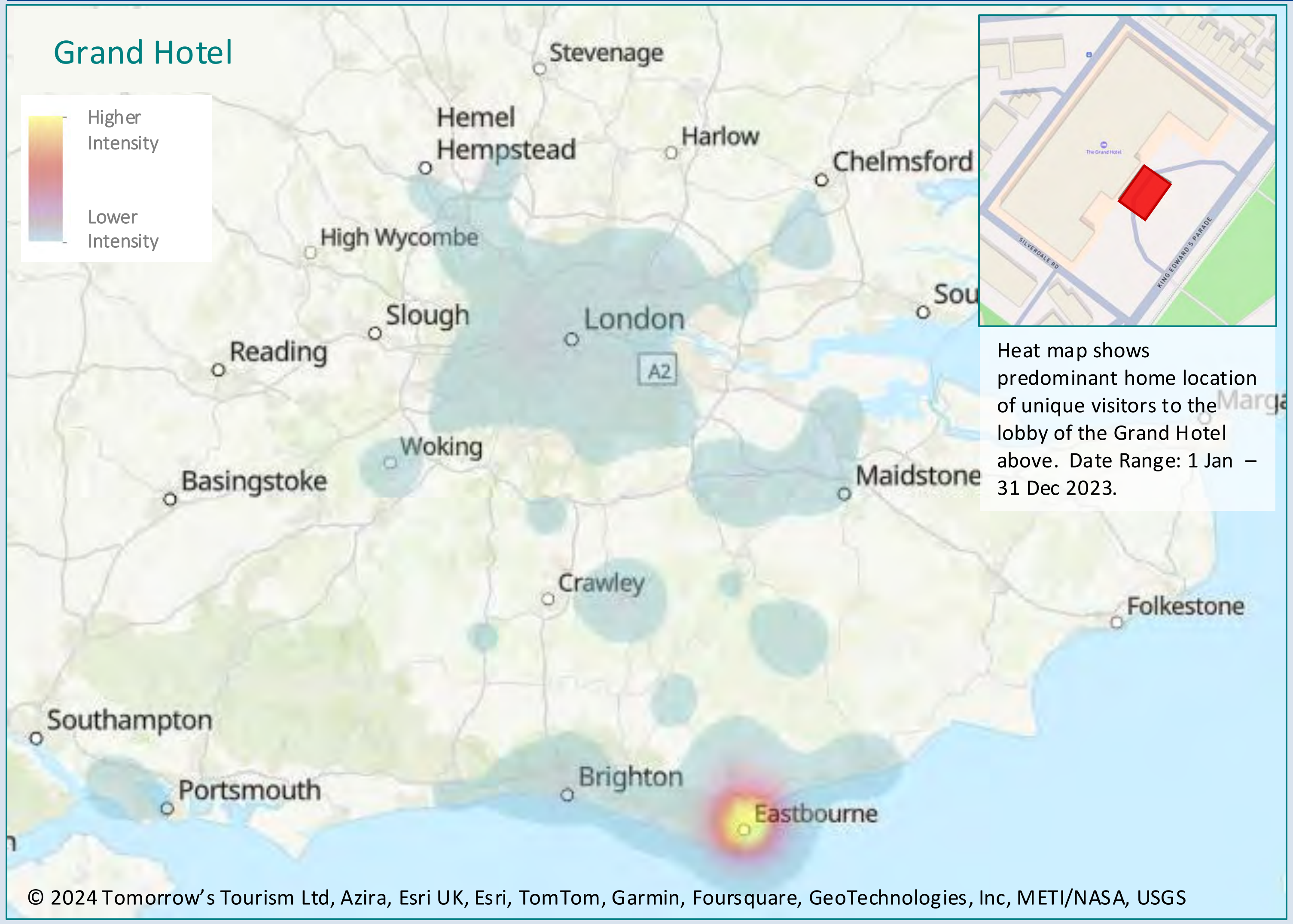
3. From the three sites, Eastbourne draws from a relatively local catchment with some visitors from the wider South East region including London. The map shows flows particularly from main centres of population but only a little over 5% of visitors are travelling from over 100 miles away or from overseas. Usually these visitors will be staying, either with friends & relatives or in commercial accommodation.

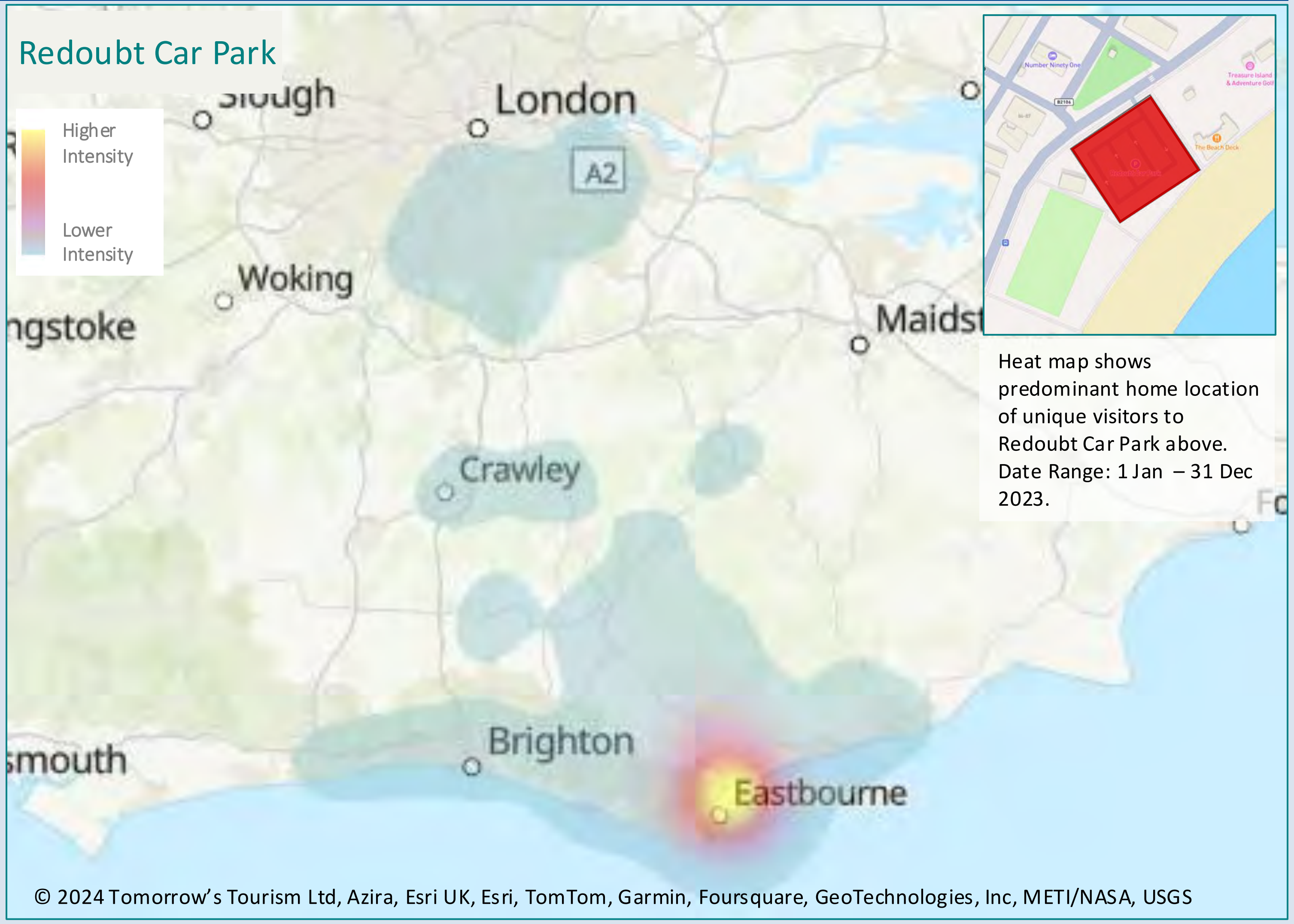
4. The overseas league table to the left shows the overseas markets to the three sites in Eastbourne, generally reflecting the UK norm. The exceptions are France and Spain where Eastbourne is significantly over-represented which may be because of the language school market, key events such as the tennis or reflect ex-pat movements. Ireland and the USA are under-indexed meaning that the town attracts proportionally fewer of these visitors than other parts of the UK. The relatively poor showing of Ireland is likely to be geographic as the North West traditionally receives a high level of VFR traffic from Ireland. Over-indexing of French and Spanish markets represents an opportunity.

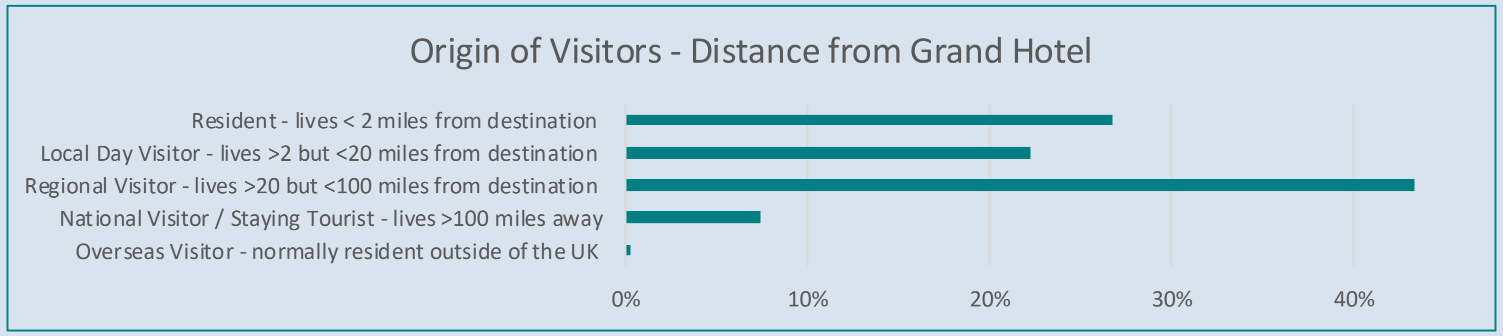
Notes:

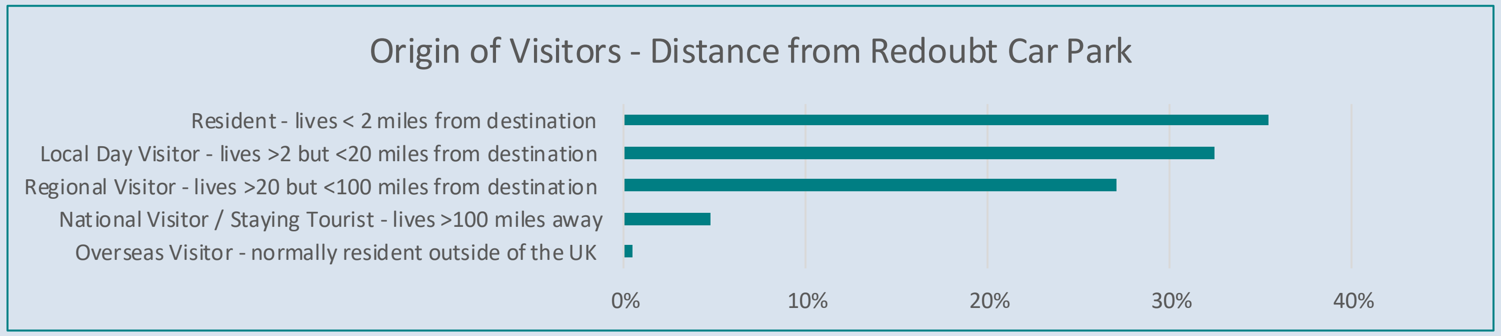
1. Mobile data relates to the period from 1 January 2023 to 31 December 2023.
2. Top Overseas markets compared with VisitBritain's IPS Total UK Summary 2022 available here together with a decade of IPS Top Towns data. EB V ENG column shows the relative strength of Eastbourne when compared with what the UK receives from its top markets. 2022 was still COVID-19 affected so may not be illustrative of the longer-term trend.

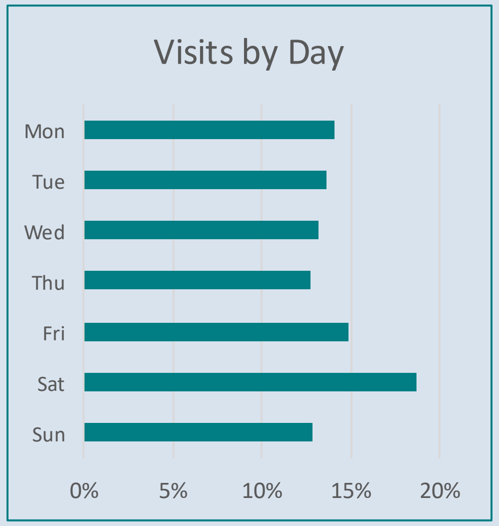
3.2 Grand Hotel & Redoubt Car Park

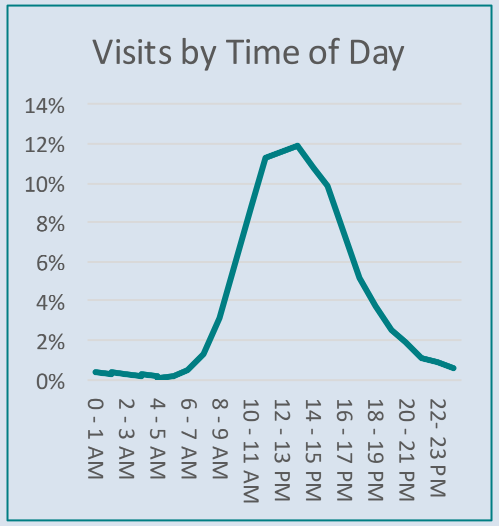


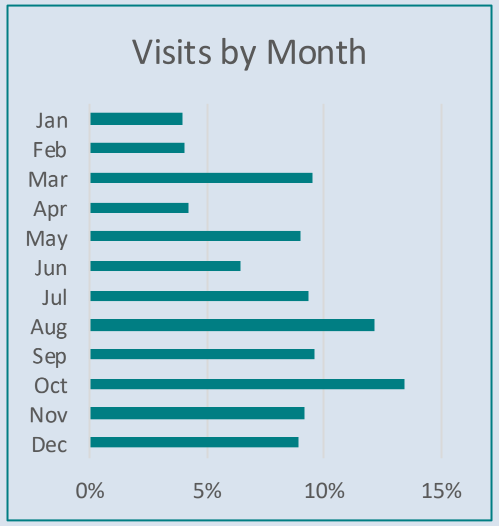


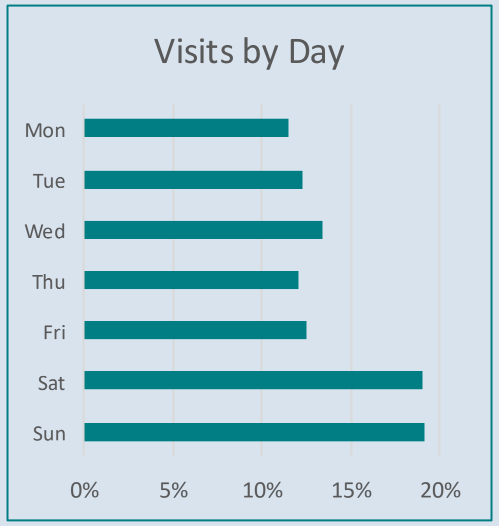


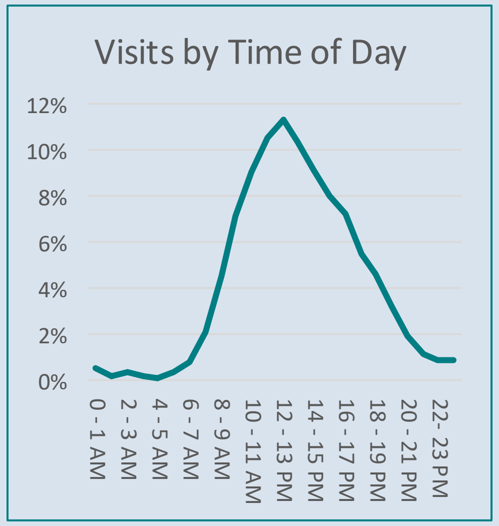


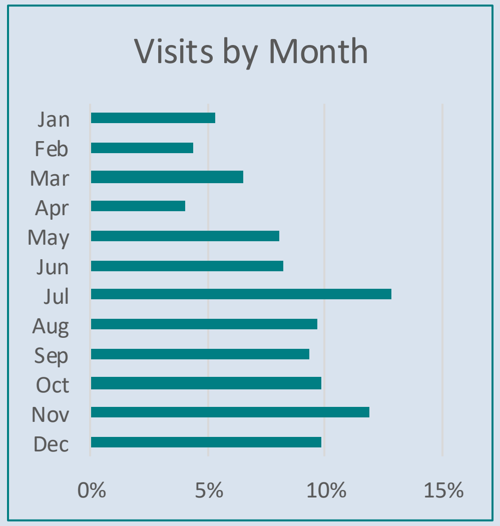






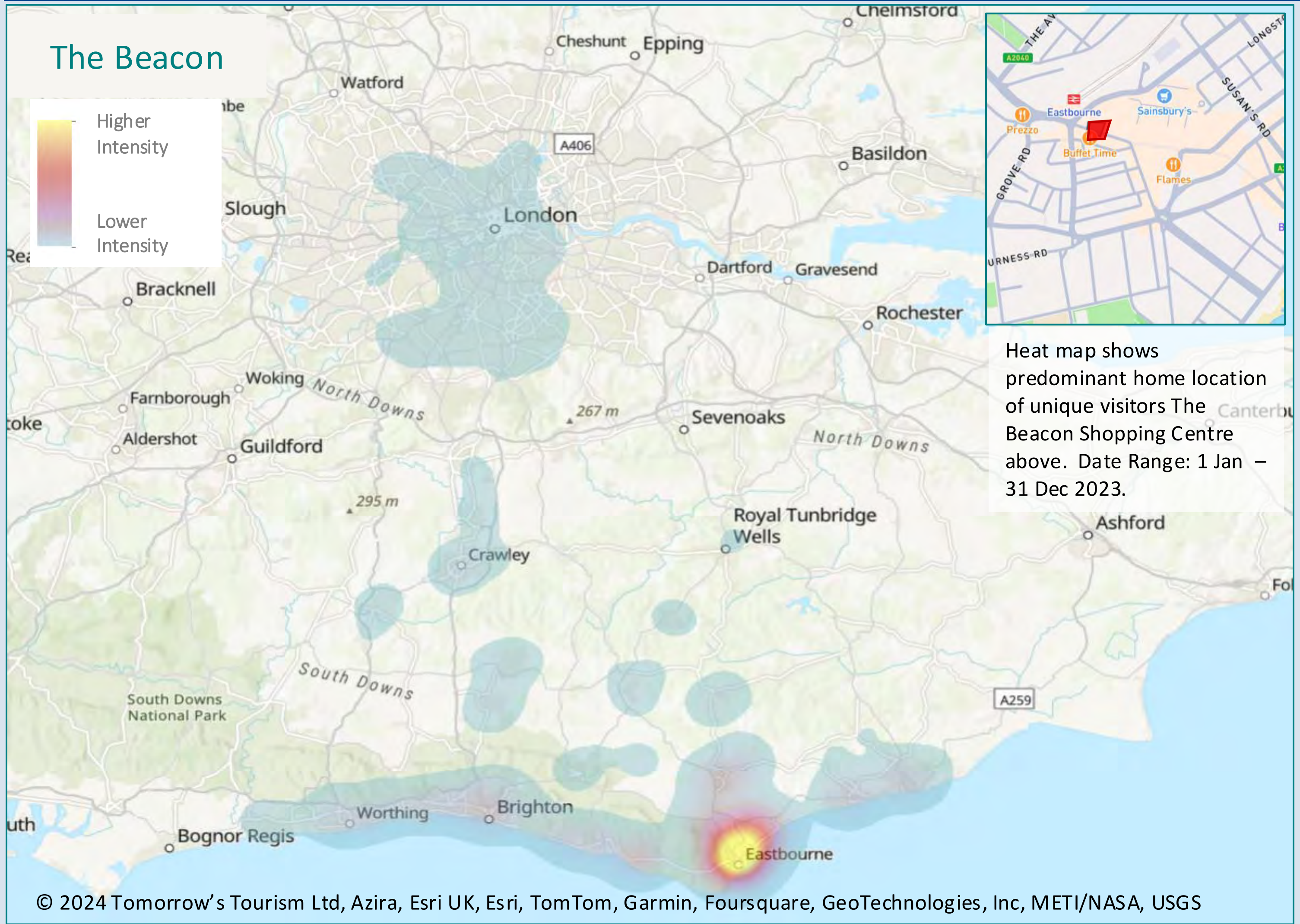




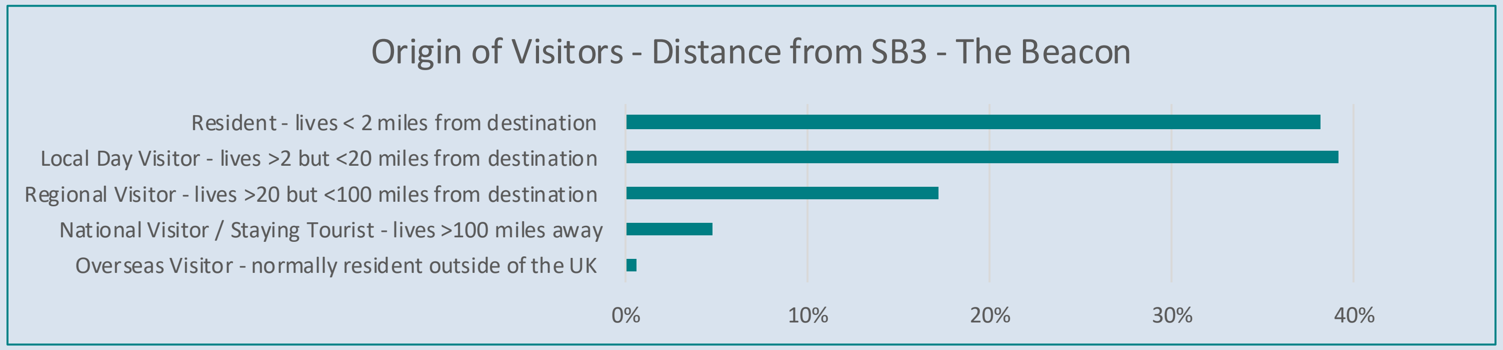


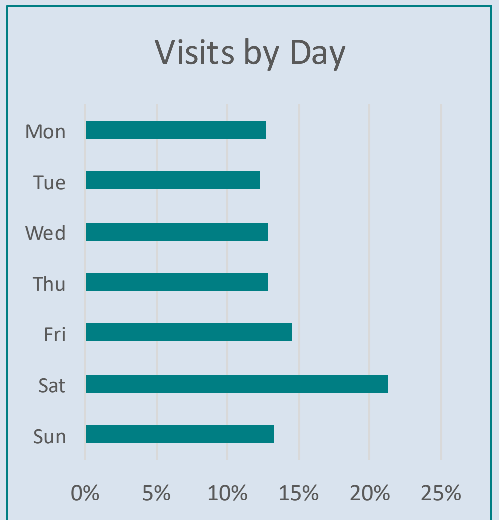
3.3 Beacon Shopping Centre

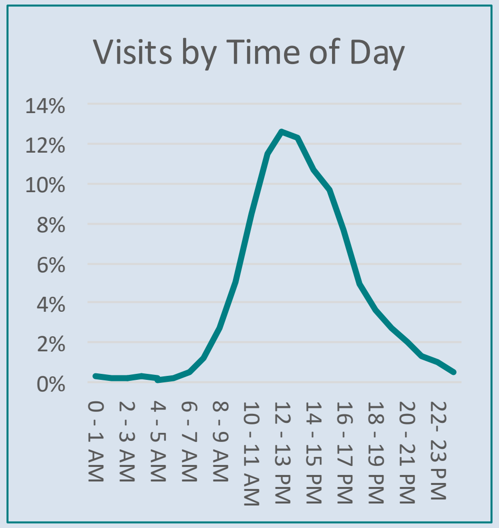
Market Review – Summary

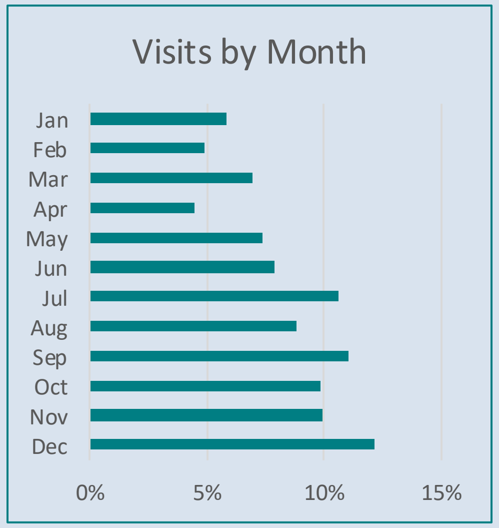


Heat map shows predominant home location of unique visitors The Beacon Shopping Centre above. Date Range: 1 Jan – 31 Dec 2023.









1. For each location a small Point of Interest was identified and mobile devices that were actively using web apps, such as mapping, detected in that area during 2023 are reported. The shadings on the maps summarises the sample - with these areas being the devices 'Common Evening Location', normally this is where the visitor lives.

2. The Points of Interest selected are all different types (i.e. hotel, shopping centre, seaside car park) to reflect a range of visitor types. All three locations show a largely local and regional visitor base with just 5.4% of visitors coming from further than 100 miles. London is an important source of visitors reflecting that 20% of all visitors travel more than 20 miles but less than 100. There is a similar pattern in terms of time of day at all three sites with a peak in visitors during the afternoons.

3. The Grand Hotel receives visitors largely from the local and regional areas, living within 100 miles (which includes Greater London). The hotel has the highest ratio of visitors who live between 20 and 100 miles away – showing its importance as a regional and to some extent a national attraction as it receives the highest proportion of visitors from over 100 miles away (7.4% of total) when compared with the other review areas. Just under 8% of visitors were from further afield, but surprisingly only 0.2% recorded from overseas. The study location was the hotel lobby, so the count will include day visitors to the restaurants, spa and events in addition to overnight visitors.

Half of all Visitors from outside Eastbourne come from:

Local Authority Area	%
Brighton and Hove	9.3%
Mid Sussex	5.1%
Adur	4.2%
Worthing	2.8%
Tunbridge Wells	2.5%
Croydon	2.2%
Bromley	2.2%
Horsham	2.2%
Crawley	2.0%
Arun	1.8%
Tonbridge and Malling	1.6%
Reigate and Banstead	1.5%
Medway	1.3%
Tandridge	1.3%
Maidstone	1.3%
Brent	1.2%
Sevenoaks	1.2%
Sutton	1.1%
Bexley	1.1%
Wandsworth	1.1%
Merton	1.0%
Lambeth	0.9%
Greenwich	0.9%
	49.9%

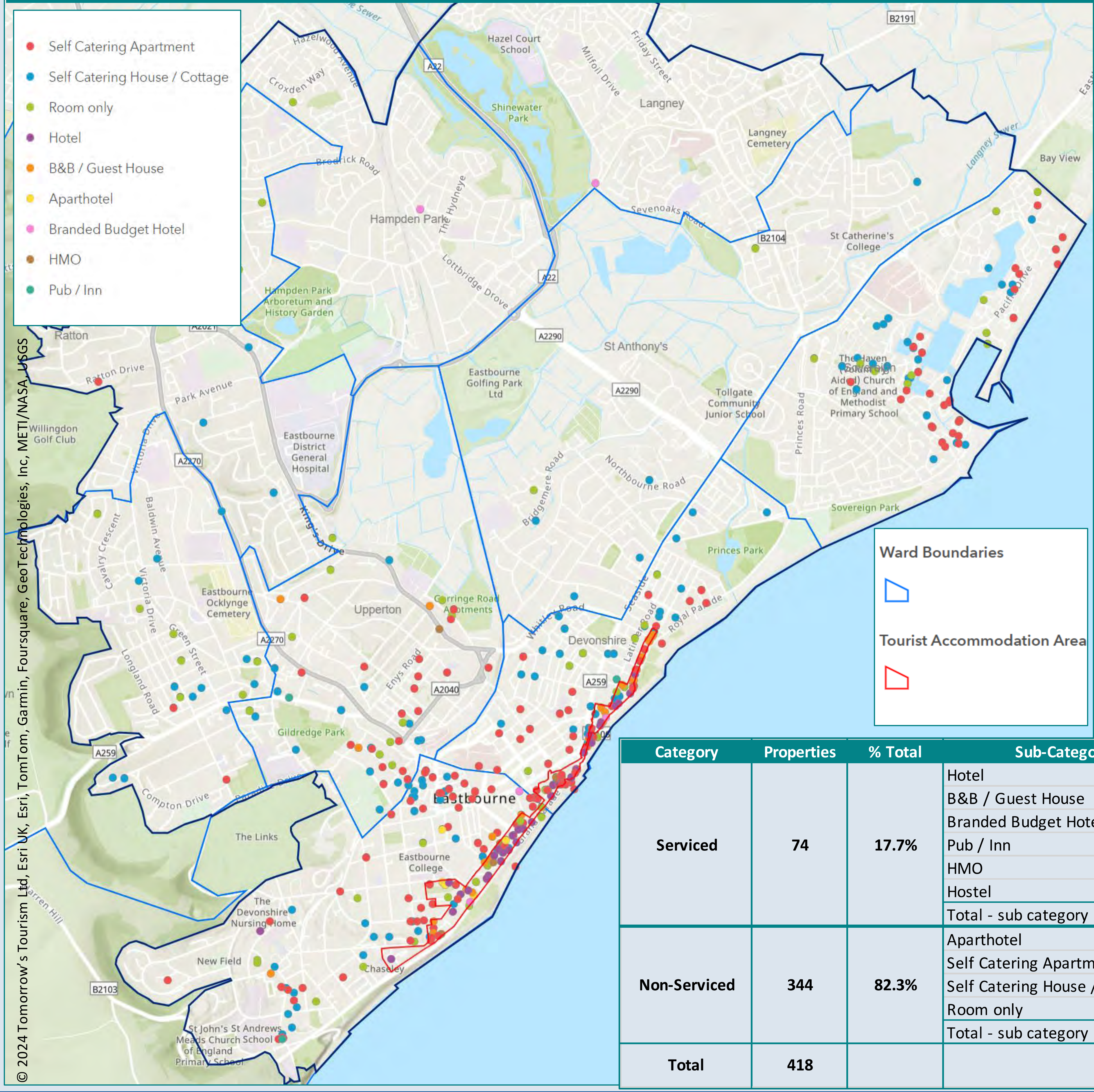
5. Almost 70% of Redoubt Car Park's users come from within 20 miles, with a further 27% from up to 100 miles away. Peak days are weekends, with the London market notably coming largely from South London (those with cars are more likely to drive south than around the city, whereas the other two locations will receive more visitors arriving by train or bus from central London).

6. The Beacon attracts a significantly higher number of visitors than the other sites, and from an even more local market, with almost 80% originating from within 20 miles. As can be expected, Saturdays are significantly busier, with the rest of the week maintaining a fairly constant flow.

7. As far as specific markets from outside of the county the table to the left identifies areas that have a high affinity with the three locations. The percentage of visitors from each market more or less reflects the distance from Eastbourne.

4.1 Accommodation – Distribution across the Borough by Type

Accommodation Establishments – by Sub-Category



1. The town has 418 accommodation establishments offering some 3,700 rooms and 7,100 beds.
2. This map gives a high level view of the distribution of this accommodation across the Borough – showing all assets by sub-category – quantified also in the larger table below. At this level it is apparent that there are two main clusters: - the Tourism Accommodation Area covering Meads and Devonshire wards, and developed latterly, Sovereign Harbour and its related ward – see Table 1 below. These three wards account for 78% of total stock. The southern end of Upperton, with its proximity to the town centre and seafront, also hosts around 50 properties, the majority of it non-serviced.
3. Over 80% of properties (344) are non-serviced with 18% serviced (74). The position is reversed when considering rooms, where 71% are offered by serviced properties with 29% in the non-serviced sector.
4. In comparison, Tendring Borough, which includes the resort of Clacton in Essex, has 81 serviced properties and 229 non-serviced, the latter of which includes substantial numbers of holiday parks and caravan sites.

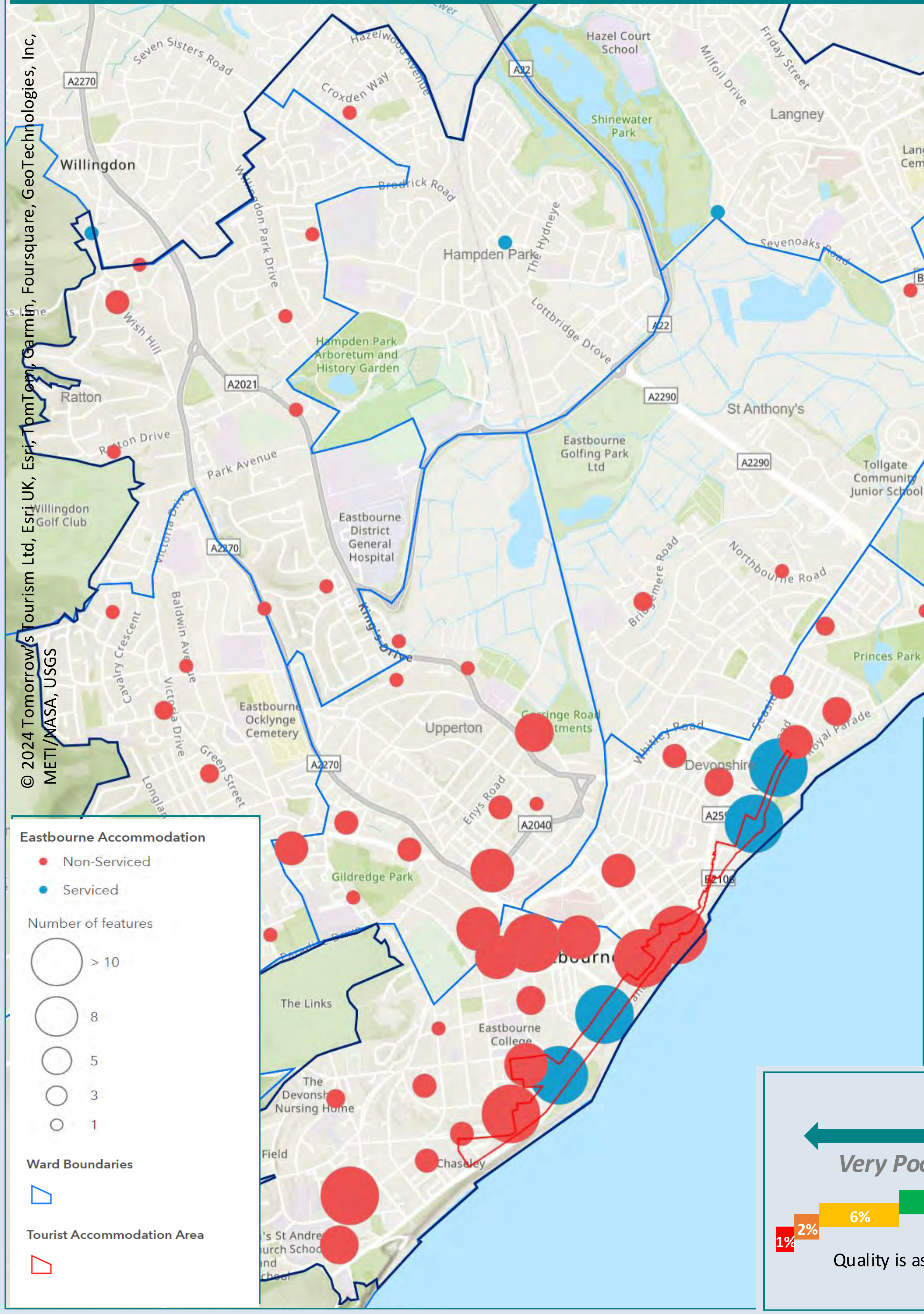
Table 1 Ward		
Devonshire	122	29.2%
Hampden Park	1	0.2%
Langney	1	0.2%
Meads	140	33.5%
Old Town	20	4.8%
Ratton	11	2.6%
Sovereign	64	15.3%
St Anthony's	7	1.7%
Upperton	52	12.4%
	418	

5. Serviced properties offer 1,314 rooms, half of the number in Eastbourne, however the Borough is 13 times the land area of Eastbourne's planning zone giving more space for other formats. Eastbourne remains one of the highest concentrations of accommodation in a resort context.

Category	Properties	% Total	Sub-Category	Nos.	% of Sub-Cat	Units	Rooms	%	Beds
Serviced	74	17.7%	Hotel	32	43%		1,898	72.3%	3,796
			B&B / Guest House	29	39%		271	10.3%	538
			Branded Budget Hotel	5	7%		327	12.5%	714
			Pub / Inn	3	4%		14	0.5%	28
			HMO	5	7%		115	4.4%	124
			Hostel	0	0%		0	0.0%	0
			Total - sub category	**74**	**100%**		**2,625**	**100%**	**5,200**
Non-Serviced	344	82.3%	Aparthotel	8	2%	6	190	17.6%	232
			Self Catering Apartment	156	45%	210	372	34.5%	834
			Self Catering House / Cottage	122	35%	122	324	30.0%	635
			Room only	58	17%	50	193	17.9%	176
			Total - sub category	**344**	**100%**	**388**	**1079**	**100.0%**	**1,877**
Total	**418**			**418**		**338**	**3,704**		**7,077**

4.2 Accommodation – by Clustered Category & Quality

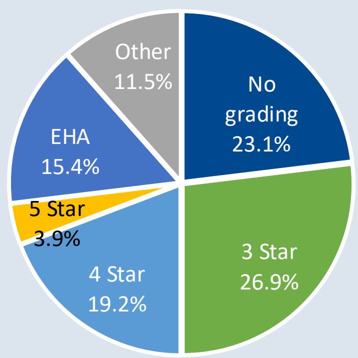
Accommodation Establishments – Clustered by Main Category



1. The map shows clustered categories by property – with each large circle containing more than 10 properties of that type. The predominance of hotels (blue) is shown in the Tourism Accommodation Area with non-serviced properties also across this area, in Sovereign Harbour and to a a lesser extent dotted around the town.
2. The quality score is generally good with 91% being in the top quartile and the pie chart shows the (self-assessed) proportions across predominantly the serviced sector. A small number of properties have additional awards from AA, VisitEngland or Green Tourism although these types of additional awards may not be as prevalent as seen in other destinations.
3. In terms of accessibility, 47 (11%) of properties are listed on Booking.com as having units on the ground floor or accessible by lift. 36 of these state more specific accessibility measures.
4. 11% of establishments report taking steps to provide more sustainable and environmentally friendly travel (on Booking.com).
5. There is, however, a worrying number of poor quality establishments which are dragging down the overall quality of the town's offer and creating many issues for visitors, evident from online platforms. The list of the bottom ten hotels is given below and would likely benefit from dedicated enforcement, reviews by trading standards and possibly planning action further to more detailed assessment.

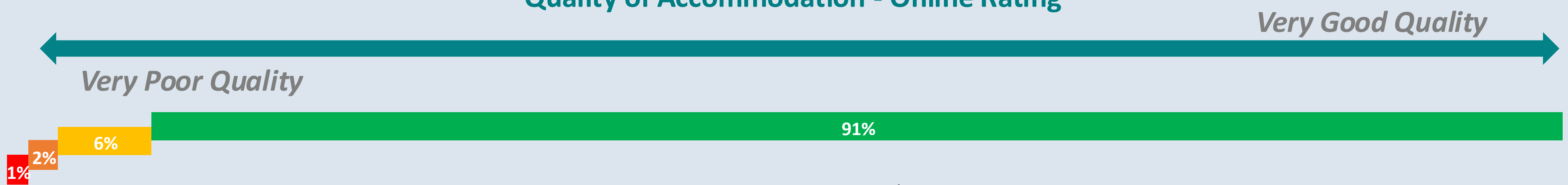
Poor Quality Hotels	% of Very Good + Excellent Ratings
Albany (Lions) Hotel / OYO Diamond Hotel Eastbourne	42%
Cavendish Hotel	48%
Majestic Hotel	49%
Glastonbury Hotel	53%
OYO Marine Parade Hotel	56%
Burlington Hotel	65%
OYO Oban Hotel	65%
Citrus Hotel	65%
Hadleigh Hotel	66%
OYO Carlton Court Hotel	68%

Grading of Accommodation



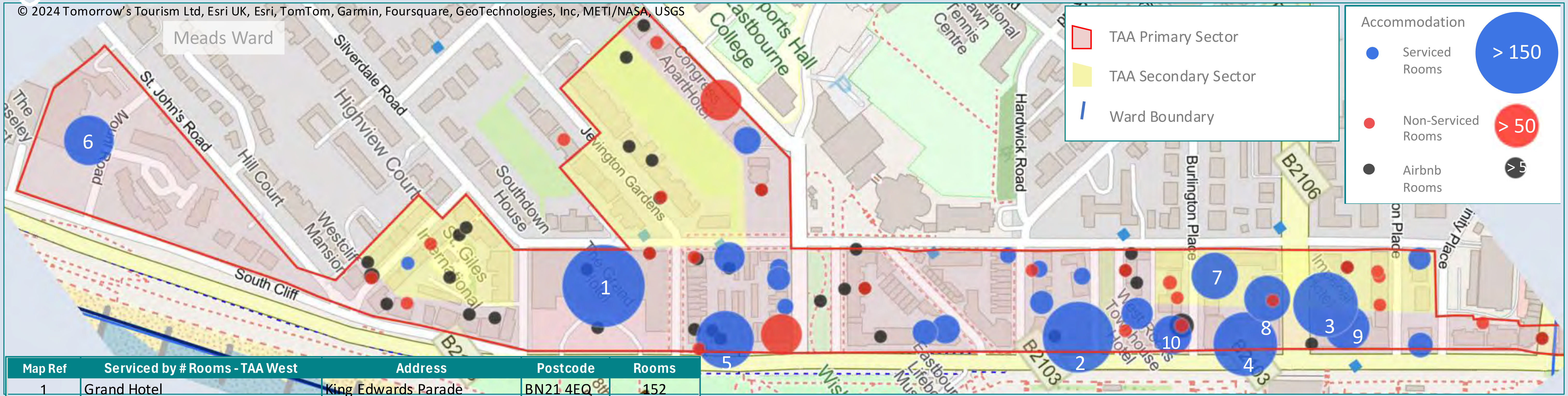
May 2024 – Survey of Accommodation Providers n=26 – Self-assessed (B&Bs 13, Hotels 10)

Quality of Accommodation - Online Rating



Quality is assessed by taking all accommodation establishments' reviews on TripAdvisor/Booking.com and giving each a percentage score based on the number of 'excellent' and 'very good' ratings combined as a proportion of total ratings. These are then sorted into Quartiles as per the bar chart.

4.3 Tourism Accommodation Area - West



Map Ref	Serviced by # Rooms - TAA West	Address	Postcode	Rooms
1	Grand Hotel	King Edwards Parade	BN21 4EQ	152
2	The View Hotel	Grand Parade	BN21 4DN	126
3	Imperial Hotel	16 Devonshire Place	BN21 4AH	113
4	Cavendish Hotel	38 Grand Parade	BN21 4DH	111
5	The Lansdowne Hotel (BW)	King Edward's Parade	BN21 4EE	98
6	Hydro Hotel	Mount Road	BN20 7HZ	82
7	Hadleigh Hotel	14-22 Burlington Place	BN21 4AR	75
8	Haddon Hall Hotel	17 Devonshire Place	BN21 4AJ	74
9	Cumberland Hotel	34-36 Grand Parade	BN21 3YT	72
10	Albany Hotel / OYO Diamond	42-43 Grand Parade	BN21 4DJ	59
				962

TAA Stock	Total	%	Serviced	%	Non-Serviced	%
TAA Primary Sector	89	72%	49	83%	40	63%
TAA Secondary Sector	34	28%	10	17%	24	38%
TAA Total	***123***		***59***		***64***	
TAA West	**56**	**46%**	**26**	**44%**	**30**	**47%**
TAA East	67	54%	33	56%	34	53%
TAA Total	***123***		***59***		***64***	
Inside TAA	123	29%	59	51%	64	21%
Outside TAA	295	71%	56	49%	239	79%
	418		**115**		**303**	

TAA Rooms	Total	%	Serviced	%	Non-Serviced	%
TAA Primary Sector	2,306	83%	2,020	86%	286	66%
TAA Secondary Sector	489	17%	341	14%	148	34%
TAA Total	***2,795***		***2,361***		***434***	
TAA West	**1,629**	**58%**	**1,287**	**55%**	**342**	**79%**
TAA East	1,166	42%	1,074	45%	92	21%
TAA Total	***2,795***		***2,361***		***434***	
Inside TAA	2,795	75%	2,361	90%	434	40%
Outside TAA	909	25%	264	10%	645	60%
Total	**3,704**		**2,625**		**1,079**	

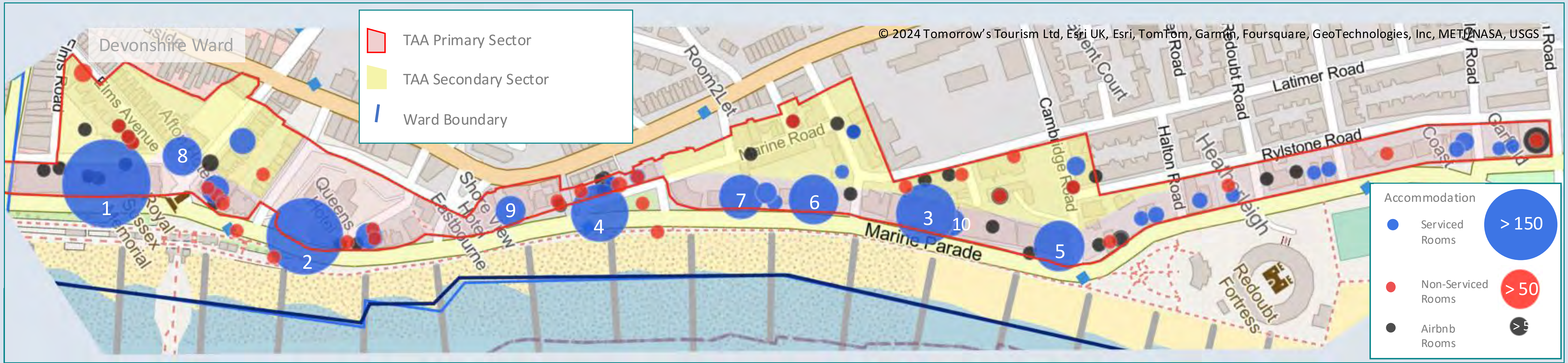
1. There are 123 accommodation establishments in the Tourism Accommodation Area (TAA), of which 89, or 72%, are in the Primary Sector. A total of 48 are serviced properties and 41 non-serviced. The TAA offers a total of 2,795 rooms, some 75% of Eastbourne's total, of which 84% are serviced and 15% are in non-serviced properties.[1]
2. The Western end of the TAA has 26 serviced and 30 non-serviced properties with 1,287 and 342 rooms respectively. The 1,287 rooms in the serviced sector in the western section represents 49% of all serviced accommodation in the Borough. When considering the entire zone in terms of rooms, the TAA represents 90% of all serviced accommodation in Eastbourne but only 40% of non-serviced accommodation.
3. 83% of the serviced stock and 86% of the rooms are in the TAA's Primary Sector across the entire zone and shaded pink on the map. The non-serviced stock is more spread out across the two zones although the largest two shown in red on this map can be seen as outliers: the Duke Aparthotel and Citrus Hotel to its south are in the Primary Sector and both were previously full service establishments.
4. The top 10 hotels referenced on the map offer 962 rooms which equates to 74.8% of the total serviced room stock in the western part of the TAA. This is almost identical in the eastern section, meaning that the remaining 16 hotels account for just 25% of rooms (325).
5. The average size of serviced hotels in Eastbourne is 59 rooms with budget hotels slightly higher at 65 rooms. The average size of a Top 10 property in the western part of the TAA is 96 rooms, where this falls to an average of 7 rooms for hotels that fall outside of the Top 10. This can be seen visually on the map. The Airbnb rooms, most of them single, give an indication of the penetration of this type of accommodation which is marginal in terms of rooms but significant in terms of numbers of units.[2] Much of the room-stock in the TAA is in heritage listed properties which are less efficient and also may not always meet today's customer expectations.

Notes:

1. Some properties, such as the Citrus Hotel, are not what would be defined as full service but may offer breakfast. They have been defined as Aparthotels in the main dataset.

2. The Airbnb dataset has been consolidated at the level of unit in the main dataset. The black dots are geolocating individual properties which may be operated as part of a number of units or properties.

Tourism Accommodation Area - East



3	Majestic Hotel	26-34 Royal Parade	BN22 7AN	95
4	Shore View Hotel	20 Marine Parade	BN22 7AY	90
5	Langham Hotel	43-49 Royal Parade	BN22 7AH	77
6	York House Hotel (Best Western)	14-22 Royal Parade	BN22 7AP	75
7	Glastonbury Hotel	4-9 Royal Parade	BN22 7AR	64
8	Afton Hotel	2-8 Cavendish Place	BN21 3EJ	54
9	Eastbourne Riviera Hotel	26 Marine Parade	BN22 7AY	37
10	East Beach Hotel	23-25 Royal Parade	BN22 7AN	32
				810

TAA Stock	Total	%	Serviced	%	Non-Serviced	%
TAA Primary Sector	89	72%	49	83%	40	63%
TAA Secondary Sector	34	28%	10	17%	24	38%
TAA Total	***123***		***59***		***64***	
TAA West	56	46%	26	44%	30	47%
TAA East	**67**	**54%**	**33**	**56%**	**34**	**53%**
TAA Total	***123***		***59***		***64***	
Inside TAA	123	29%	59	51%	64	21%
Outside TAA	295	71%	56	49%	239	79%
	418		**115**		**303**	

TAA Rooms	Total	%	Serviced	%	Non-Serviced	%
TAA Primary Sector	2,306	83%	2,020	86%	286	66%
TAA Secondary Sector	489	17%	341	14%	148	34%
TAA Total	***2,795***		***2,361***		***434***	
TAA West	1,629	58%	1,287	55%	342	79%
TAA East	**1,166**	**42%**	**1,074**	**45%**	**92**	**21%**
TAA Total	***2,795***		***2,361***		***434***	
Inside TAA	2,795	75%	2,361	90%	434	40%
Outside TAA	909	25%	264	10%	645	60%
Total	**3,704**		**2,625**		**1,079**	

1. There are 33 serviced and 34 non-serviced properties in the Easter section with 1,074 and 92 rooms respectively. The 1,074 rooms in the serviced sector in the eastern section represents 41% of all serviced accommodation in the Borough. When considering the entire zone, the TAA represents 90% of all serviced accommodation in Eastbourne but only 40% of non-serviced accommodation.

2. There is a striking difference in terms of size of the non-serviced properties on the eastern side compared to the west. This map shows many smaller concerns with a total of 92 rooms in 34 properties (Avg. 2.7 rooms per property) while in the western section there are 342 non-serviced rooms in 30 properties (avg. 11.4 rooms). Overall this means that in the TAA, 79% of non-serviced rooms are contained in the western half. Part of this relates to the large aparthotels in the west.

3. 83% of the serviced stock and 86% of the rooms are in the TAA's Primary Sector across the entire zone and shaded pink on the map. The non-serviced stock is spread across the two zones at 63% / 38%.

4. The top 10 hotels referenced on the above map offer 810 rooms which equates to 75.4% of the total serviced room stock in the eastern part of the TAA. This is almost identical in the western section, meaning that the remaining 23 hotels account for just 25% of rooms.

5. The average size of serviced hotels in Eastbourne is 59 rooms with budget hotels slightly higher at 65 rooms. The average size of a Top 10 property in the eastern section of the TAA is 81 rooms, where this falls to an average of 5 rooms for hotels that are outside of the Top 10. This can be seen visually on the map. The Airbnb units, most of them single, give an indication of the penetration of this type of property which is marginal in terms of rooms, but significant in terms of numbers of units.[2]

Notes:

1. Some properties, such as the Citrus Hotel, are not what would be defined as full service but may offer breakfast. They have been defined as Aparthotels in the earlier main table on page 8.

2. The Airbnb dataset has been consolidated at the level of unit in the main dataset. The black dots are geolocating individual properties which may have been consolidated to units & properties for the assessment. .

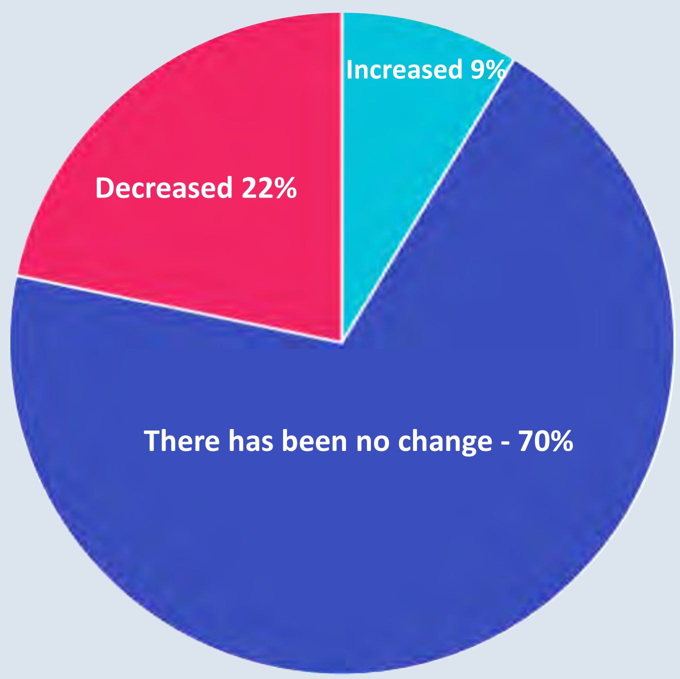
3. Locations are true to 5 point latitude and longitude in around 50% of cases. Some of the Airbnb and smaller serviced properties reflect seven digit postcode location only so are not exactly geo-located. These postcodes usually reflect approx. position but not in 100% of cases.

4.4 Accommodation – Assessment of Churn / Change of Use

Table 1	Source	Serviced	N/Serviced	Total	Growth in Est. (%)	Rooms	Growth in Rooms (%)
2014	Acorn	106	50	156		3,594	
2016	VisitEngland Stock Audit	157	42	199	28%	5,443	51%
2017	Tourism Accomm. SPD			250	60%	3,500	-3%
2019	CW / CPW Planning Study	66				3,000	-17%
2024	Tomorrow's Tourism	74	344	418	168%	3,704	3%

Table 2 - Sub Category	ACORN Est.	TT Est.	Trend	ACORN Rooms	TT Rooms	Trend
Serviced						
Hotel	42	32	**-24%**	2,613	1,898	**-27%**
B&B / Guest House	60	29	**-52%**	486	271	**-44%**
Branded Budget Hotel	4	5	**25%**	229	327	**43%**
Non Serviced						
Self-Catering house / flat	98	344	**251%**	266	889	**234%**
Total - all categories	**204**	**418**	**105%**	**3,594**	**3,704**	**3%**

Has the number of rooms available changed in the last 5 years?



May 2024 -Survey of Accommodation Providers n=23

Table 3 Closed / ceased trading - last 5 yrs	#	% of stock
B&B / Guest House	18	62%
Hotel	17	53%
Aparthotel	2	25%
HMO	1	20%
Self Catering Apartment	9	6%
Self Catering House / Cottage	4	3%

Notes:

1. Table 1 shows growth in both Establishments and Rooms using the 2014 baseline as the reference data. The 2016 VisitEngland Stock Audit figures for Rooms seem at odds with the other known surveys with basis of calculation unknown and may have been modelled rather than audited.

2. The churn figure is indicative only, 2014 data does not allow a fully accurate assessment for non-serviced.

1. A range of reports have identified Eastbourne's stock over the last decade – see Table 1. We have used the Acorn Report as the benchmark as we are not sure of the derivation of the VisitEngland data.[1] The numbers quoted in the Tourism Accommodation Retention SPD document may be drawn from the *Direction of Travel* document.

2. The mix has changed significantly over the decade as Table 2 shows. When considering establishments, (Est.) there has been significant switch in category from serviced to non-serviced. The former declined from 106 to 74 properties, while non-serviced has increased from 50 units to 344. This level of increase is following national trends with the proportion of serviced to non-serviced units moving from 52:48 to 82:18.[2]

3. However room numbers have not increased to the same degree with only a 3% overall growth in rooms over the decade since the ACORN survey. Visitor numbers have declined which has made it harder work for accommodation providers - but it is not necessarily the case that Airbnb has created a lot more supply of rooms, rather it should be regarded as a sales channel that both businesses and residents have used in order to more effectively distribute their offer.

4. Appendix III shows the churn from C1 over the last five years, particularly relating to serviced accommodation. The data range reflects submission/validation dates and cases have been identified by searching the portal for selected key terms ('hotel', etc.) and, therefore, may not be exhaustive. 30 applications were identified within the 5-year period, though these include a number of LBC and minor works applications. There have been some very modest gains from recent decisions relating to isolated developments in the TAA, for example:
   - 230269 proposed a 4 story resulting in 12 new guestrooms;
   - 220656 resulted in a net gain of 1 guestroom from the merger and extension of 2 adjoining hotels (though, as a consequence, this resulted in the net loss of 1 business).

7. Table 3 below left and its associated map by sub-category shows that the majority of closures have been in the TAA or the immediate area. This continues the trend identified by Acorn. Some of the B&B and Guesthouses may still be trading as non-serviced or now be part of the sharing economy. Table 3 shows a significant churn over the last 5 years for the serviced offering reflecting the wider trends reported in Table 2. Appendix IV shows the closed listing by property name and category.

8. The pie chart drawn from the Survey of Accommodation Providers shows the picture relating to rooms which can be considered a robust result. A net decrease of -13 shows the trend for closures repeated in rooms although it does show some operators are seizing new business opportunities and expanding the size of their businesses.

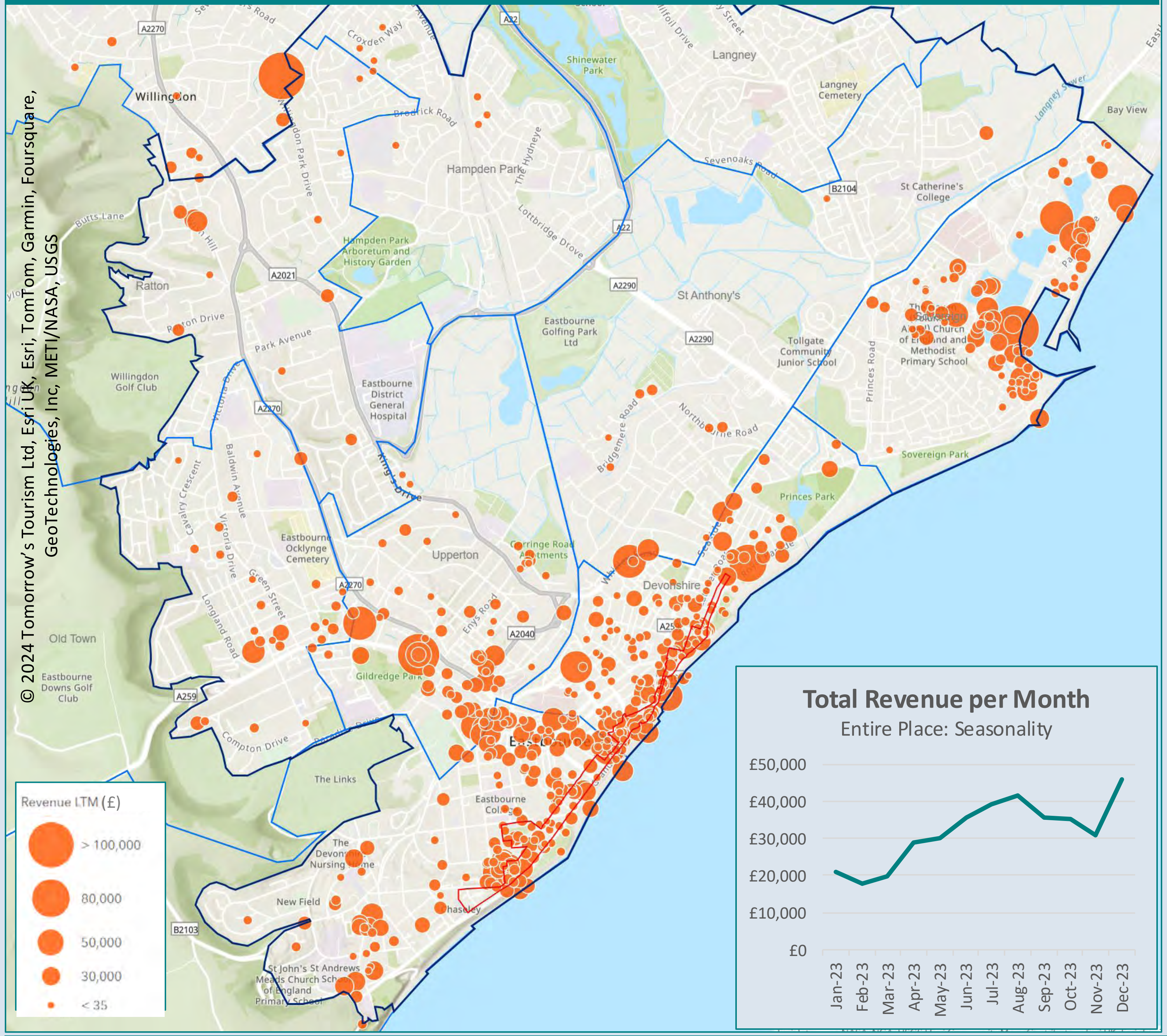
9. In the survey, two owners (9%) from 23 indicated that the ownership of the accommodation had changed over the last five years.

10. Planning permission had been sought by 4 businesses (17%) with three being successful and one unsuccessful. 19 businesses (or 82%) had made investments over the last five years averaging £189,000 per property with a median spend by property of £35,000. However forward investment plans are hampered by current economic conditions.

"Money is very scarce at the moment as we are paying back a lot from COVID-19 and there are no guests this year that are coming and bookings are very thin on the ground"

4.5 Another view of the Sharing Economy

Airbnb Establishments – Size by Revenue



1. The Sharing Economy in Eastbourne has grown significantly since 2016 as Chart 1 below shows. That growth has resulted in a maximum of 582 establishments operating in the borough in 2023, defined as offering at least one bookable night and being available for booking. Properties are small with an average of 1.7 rooms. The sector is highly dynamic in that many properties are not always available for letting nor have confirmed reservations. There has been a noticeable shift away from renting private rooms since the COVID-19 pandemic.

2. The map shows 582 properties marketed on Airbnb or VRBO offering at least one room night and being available for bookings over the last year. The full dataset for Eastbourne of all properties that have been marketed on Airbnb or VRBO over the last 8 years is 1,582 units run by 760 hosts with an average of 1.5 rooms.

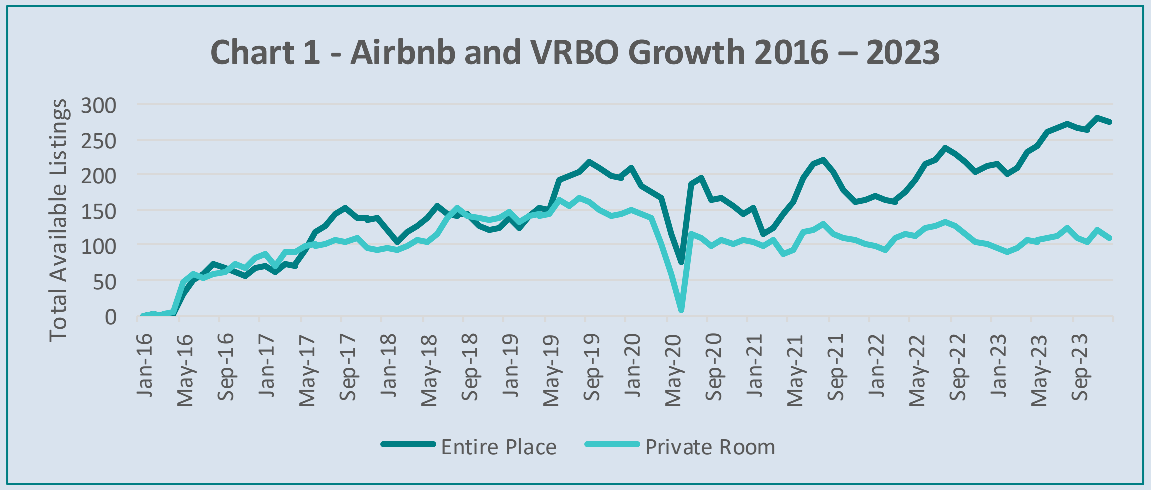
3. The revenue map shows total income per unit in 2023. The majority of these operations are small with few larger properties. The majority will be householders with either a separate annex or building or, and much less likely, a private room to let. Total income of entire places in 2023 was just over £380,000. Average occupancy across 2023 was 60.8% on the basis of Table 1 below.

4. The level playing field argument that is illustrated in the balloon comment below from a respondent to the survey will be addressed in foreseen legislation that will provide for a statutory registration scheme for all properties operating in the visitor economy. This scheme is likely to reduce the number of operators in the sharing economy space, with estimates of reductions in number of operators of up to 30% of total, as individuals are put off by the additional compliance including fire safety.

Notes:
- Data Source: AirDNA -
- Some locations on map not exact due to owner preferences
- ADR: The Average Daily Rate charged per booked entire place listing. Includes cleaning fees but not other Airbnb or HomeAway service fees or taxes
- The master-list that is underpinning the data used in this report has consolidated many of these properties.

"the Growth of Airbnb has a huge detrimental effect on businesses like us who are regulated by Fire, trading standards & other local authorities"

Table 1 - Annual Performance		Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Total Available Listings													
	Entire Place	214	200	209	232	242	262	266	273	267	265	281	274
	Private Roon	97	90	96	107	106	110	112	125	111	103	120	111
	Shared Roon	0	0	0	0	0	0	0	0	0	0	0	0
Booked Listings													
	Entire Place	176	154	172	216	226	248	252	267	243	236	209	236
	Private Roon	65	60	68	88	87	103	106	112	100	87	70	73
	Shared Roon	0	0	0	0	0	0	0	0	0	0	0	0
Occupancy													
	Entire Place	45.6%	51.1%	53.0%	65.2%	62.5%	72.2%	80.2%	79.5%	65.9%	57.6%	46.2%	50.8%
	Hotel Compa	49.2%	54.5%	52.3%	60.9%	56.6%	69.1%	76.6%	71.8%	67.7%	52.6%	47.1%	51.3%
ADR													
	Entire Place	$149.58	$145.78	$145.02	$168.26	$168.22	$180.10	$194.99	$195.12	$184.18	$188.68	$186.56	$244.46
	Hotel Compa	$101.67	$102.34	$106.61	$115.96	$117.47	$125.59	$131.97	$133.06	$116.54	$109.64	$107.35	$124.41



5.1 Survey – Summary of Accommodation Providers' Views

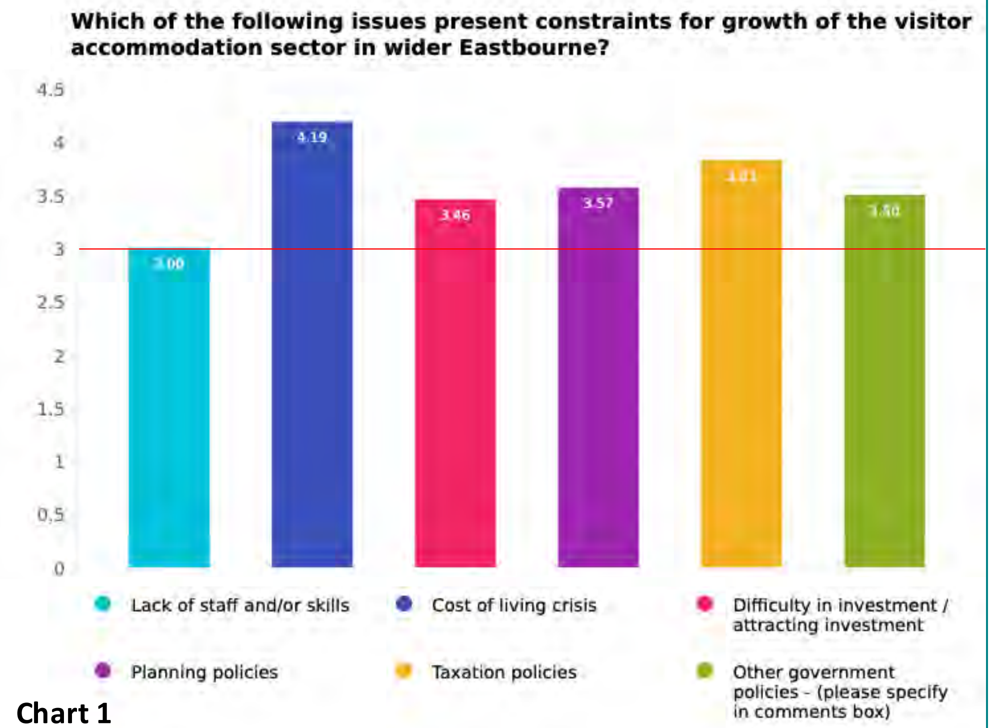


Chart 1

Views of How Appropriate the Tourism Policy / the TAA is for the town?

"Having run our B&B since 2019 we are now in our late 60's and have been on the market for 18 months trying to sell the business. It is practically impossible for a potential buyer to get a business loan and therefore we have had no offers during this time despite more viewings this year especially. The most enquiries we had have been from people wanting to live in the property as a family home which planning policies currently prohibit. This leaves us in limbo trying to run an unviable business with increasing costs whilst we get older and less able to run it."

Overall restrictions are detrimental to investment and often prohibitive and often tied up for months in red tape

Eastbourne has an imbalance of quality accommodation & it seems that 'low-end' seems to be winning!! Specially the number of HMO.

Too many hotels at present. Unsustainable for all businesses to stay profitable.

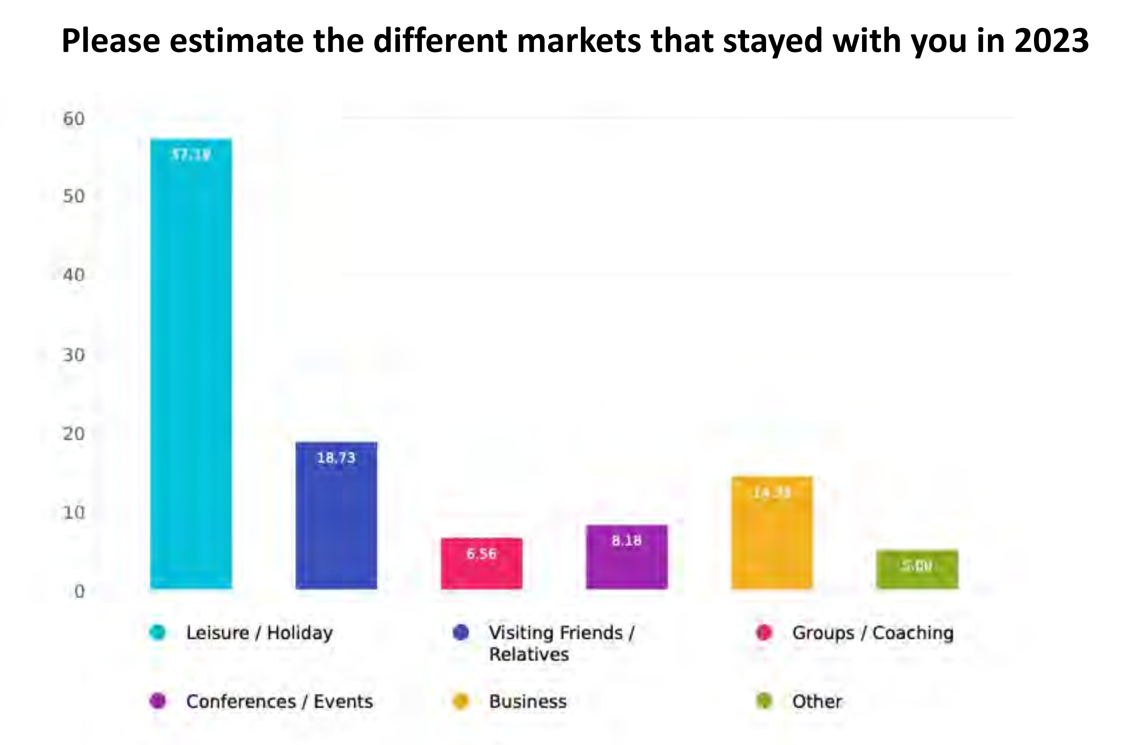
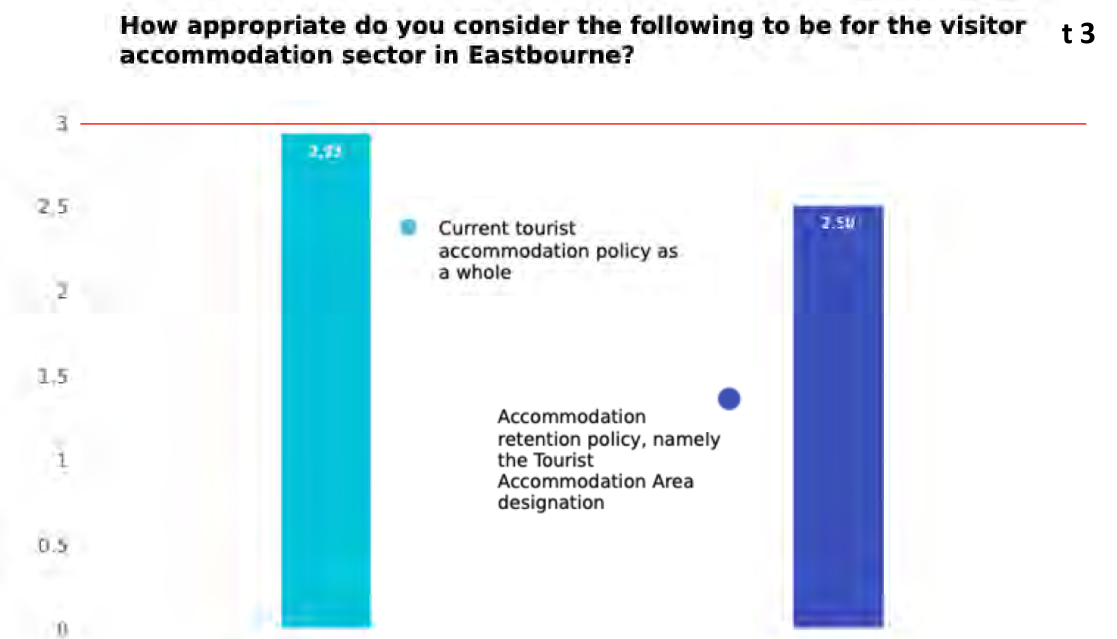


Chart 2



t 3

1. This slide looks particularly at current constraints and the planning related questions.
2. Chart 1 shows that planning policy is seen as the third most important constraint after the cost of living crisis and taxation policy.
3. A decline in trade has been caused by COVID-19, the cost of living crisis and a market shift to non-serviced accommodation. These factors also collide with structural decline which has been facing many seaside resorts for many years. Eastbourne has been affected, particularly as one of its principal markets has been escorted tour coaching market for seniors, which has also experienced decline.
4. Chart 2 shows a high reliance on the leisure / holiday market with conference / events and business around a third of all current business. A decline in smaller meetings is reflected in these figures with online meeting trends likely to remain. The larger meetings and conference market will re-emerge and could be an important opportunity in the future, subject to investment in facilities. An annual events programme could be an important way to curate and develop reasons to visit.
5. Chart 3, where respondents are invited to respond to a 5 point Likert scale, shows that businesses are generally neither in favour of the policy on tourism (average 2.9) nor the current Tourist Accommodation Area designation (2.5). However there is a mixed view, with some respondents strongly in favour, meaning that if the median is the measure used the results drop to 2.5 and 2 respectively.

5.2 Summary of Interviews with Key Stakeholders

Themes	Issues Emerging
1. COVID-19	• Significant impact on Eastbourne's tourism economy due to COVID-19 pandemic. • Shift in visitor behavior towards shorter stays and 'safe' accommodations with flexible cancellation policies. • Cessation of coach trade (exacerbated by COVID-19) viewed positively by some who consider this market segment not contributing significantly to local economy. • Concerns about lack of investment in accommodation stock due to alternative hotel market- in housing HMOs, asylum seekers, and homeless individuals - further diminishing confidence among visitors to the area. • Concerns surrounding formation of HMOs as a workaround for change of use with clear implications for the viability and quality of Eastbourne's accommodation offer. • Important to understand the motivations behind the shift from hotel to residential use, particularly in cases where properties may not be commercially viable. • Need for nuanced understanding of challenges facing tourism industry.
2. Sharing Economy Platforms	• Rise of short-term holiday lets and sharing economy platforms and challenges posed to traditional providers by booking giants (e.g. Booking.com and other OTAs). • Need for regulation to balance fairness and sustainability without stifling innovation. • Balancing the benefits of short-term lets with housing preservation is crucial • Advocacy for place-based approach and diversification of offerings. • Suggestions for business collaboration to reduce dependency on Booking.com. • Need for level playing field for accommodation businesses allowing them to benefit from the advantages enjoyed by Airbnb providers, especially regarding VAT levels. • Need to ensure some level of regulation for property safety and health, with a more flexible approach advocated for hoteliers compared to Airbnb providers.
3. Accommodation Stock and Tourism Zone	• Concerns about loss of hotel accommodation to residential conversion. • Emphasis on quality over quantity in accommodation offerings. • Current Tourism Zone may not be fit for purpose - loopholes render it ineffective. • Call for case-by-case controls on change of use and redefining tourist zone. • Need for a place-making approach that considers the visitor's journey - stakeholders urge more entrepreneurial and decisive approach to shaping development. • Importance of holding existing hotels accountable for investment and adopting a more flexible approach to accommodation retention policies. • Traditional coaching hotels identified as promising investment opportunities.
4. Accommodation Retention Policies	• Emphasis on flexibility and adaptation in retention policies. • Importance of zoning adjustments and more nuanced approach to planning, considering market trends, stock and demand. • Importance of preventing change of use to HMOs and temporary accommodation, which could deplete the destination for both visitors and locals. • Maintain Tourism Zone approach to control change of use effectively, particularly concerning issues with hotels transferring over to HMO status. • Suggest shift towards a more strategic and considered approach to change of use and zoning, with zoning adjustments tailored to benefit the area. • Need for accommodation retention policies that balance preservation with development, providing a flexible framework that supports local businesses and enhances the overall tourism experience in Eastbourne. • Importance of collaboration between stakeholders and the council to ensure that policies are practical, adaptive and conducive to sustainable growth.

Themes	Issues Emerging
5. Destination and Future Market Trends	• Clear consensus on need to prioritise quality over quantity in accommodation offer. • Importance of marketing to support existing offerings and developing packages that cater to the preferences of modern and next generation travellers - need for attractions, events and entertainment options. • Suggest adjustments to planning regulations to align with evolving visitor preferences and emphasise the importance of cultural heritage and outdoor offerings in Eastbourne's tourism strategy. Place-making approach that considers the visitor journey is advocated, recognising that Eastbourne's tourism model, rooted in its Victorian heritage, requires adaptation to meet contemporary demands. • Improved relationship with the Downs - missed opportunity that could further enrich Eastbourne's tourism appeal. • Importance of supporting the transition to NetZero and improving accessibility • Improvements to signage and navigation tools necessary to enhance visitor experience and encourage exploration of the area. • Considering overseas markets and understanding market trends are deemed essential for decision-making
6. Investment opportunities	• Enhancement of the seafront to attract visitors. • Develop boutique accommodations, cultural offerings, repurpose heritage buildings. • Challenges such as insufficient support for local stakeholders and planning restrictions on hospitality businesses need to be addressed. • Understanding why major hotel chains have not invested in Eastbourne is essential for attracting further investment. • Ongoing seafront planning initiatives aim to address these concerns by understanding local needs and learning from successful practices in nearby areas. • Improving planning priorities and evaluating commercial viability of hotel conversions to residential properties are necessary for long-term tourism growth.
7. Regulation and Policy Changes	• Consensus on necessity of regulation for fairness and compliance with standards. • Policy changes are advocated to support the local economy, prevent deterioration of the area, and promote high-quality accommodation. • Regulate the Airbnb market and implement improvement notices where necessary. • Importance of policies that promote an equal playing field for all business owners and prevent the misuse of zoning regulations. • VAT reduction in hospitality sector to encourage investment and sustainability. • Flexibility in accommodation retention policies is suggested to accommodate changing needs. • Need for planning to focus on design and economic viability rather than mass/scale. • Proactive approach to encouraging investment in existing hotels and considering the visitor journey needed.

Notes:

1. Insights gathered from one-to-one interviews with eight key stakeholders, including accommodation providers, the Leader of the Council, Culture and Tourism Managers and the Eastbourne Hospitality Association. Interviews provide a valuable direction for the Council's commitment to developing a Local Plan to support the development of a thriving and resilient tourism landscape. Interviewees highlighted optimism about Eastbourne's tourism future despite current challenges. Collaboration between Council and businesses is identified as essential to supporting the industry to thrive.
2. We have consolidated interviewee perspectives into seven themes to inform the planning / decision-making processes.

5.3 Survey – Summary of Residents' Views

I would like to see the seafront closed to motor traffic with electric buses taking people from edge of town parking to the centre.

Table 1 - Please indicate your level of agreement with the following statements

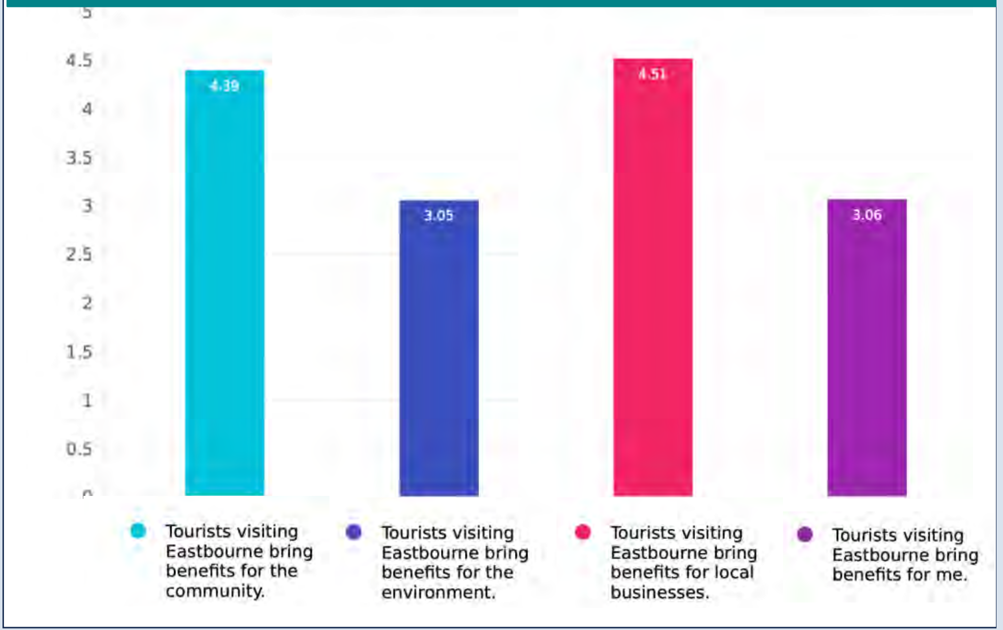


Table 3 - What opportunities do you see for the future development of tourism or tourist accommodation in Eastbourne? *n = 295*

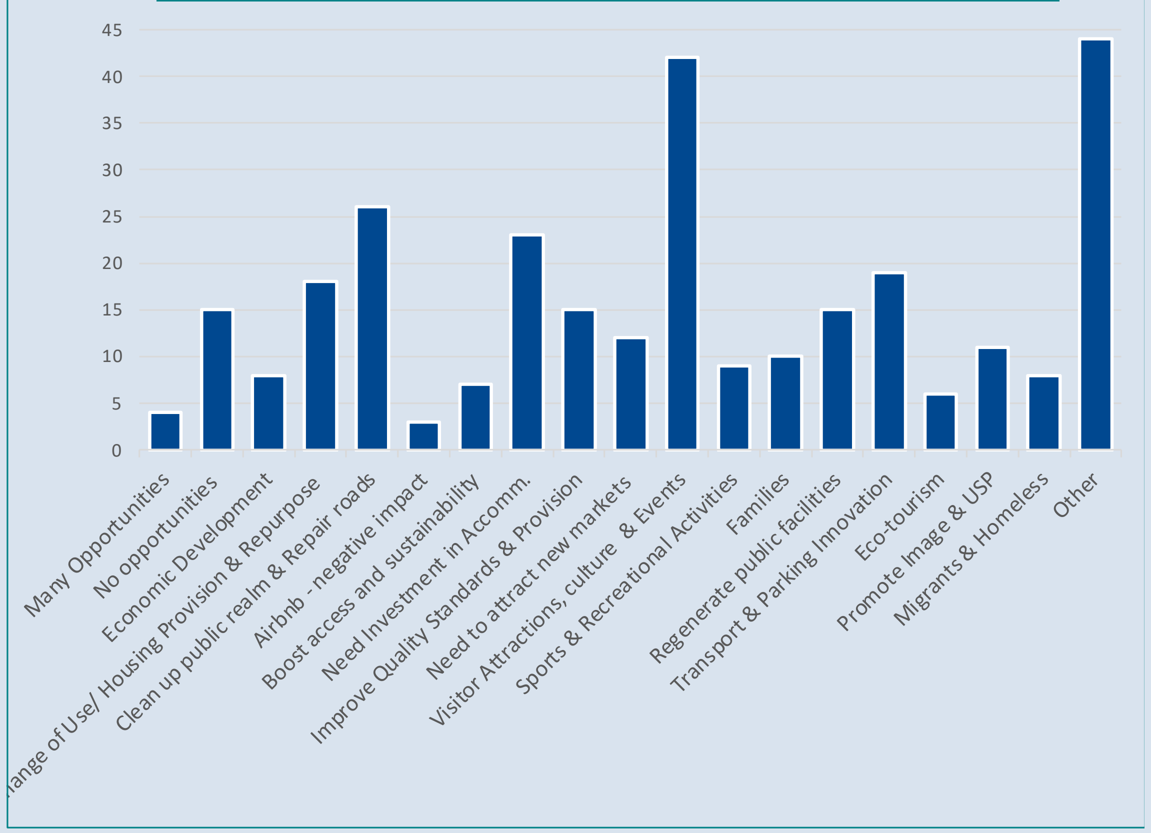
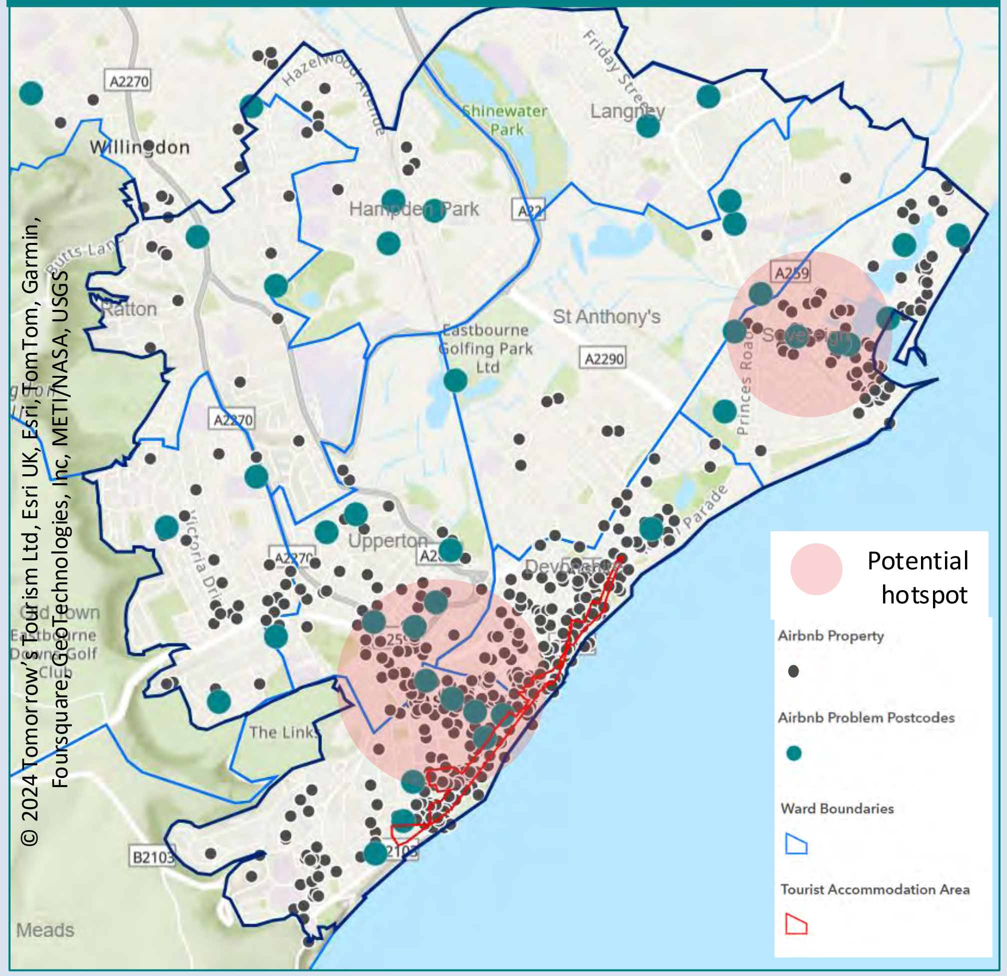
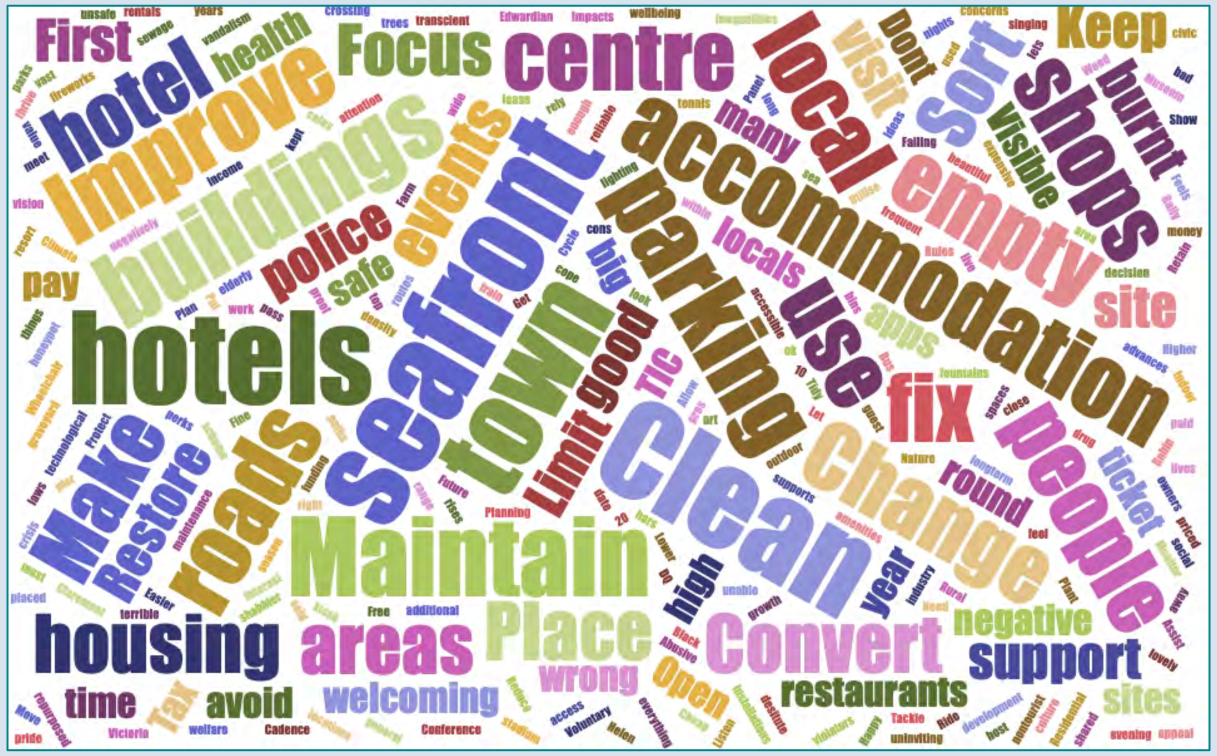


Table 2 Reportedly Problematic *Sharing Economy* Postcodes





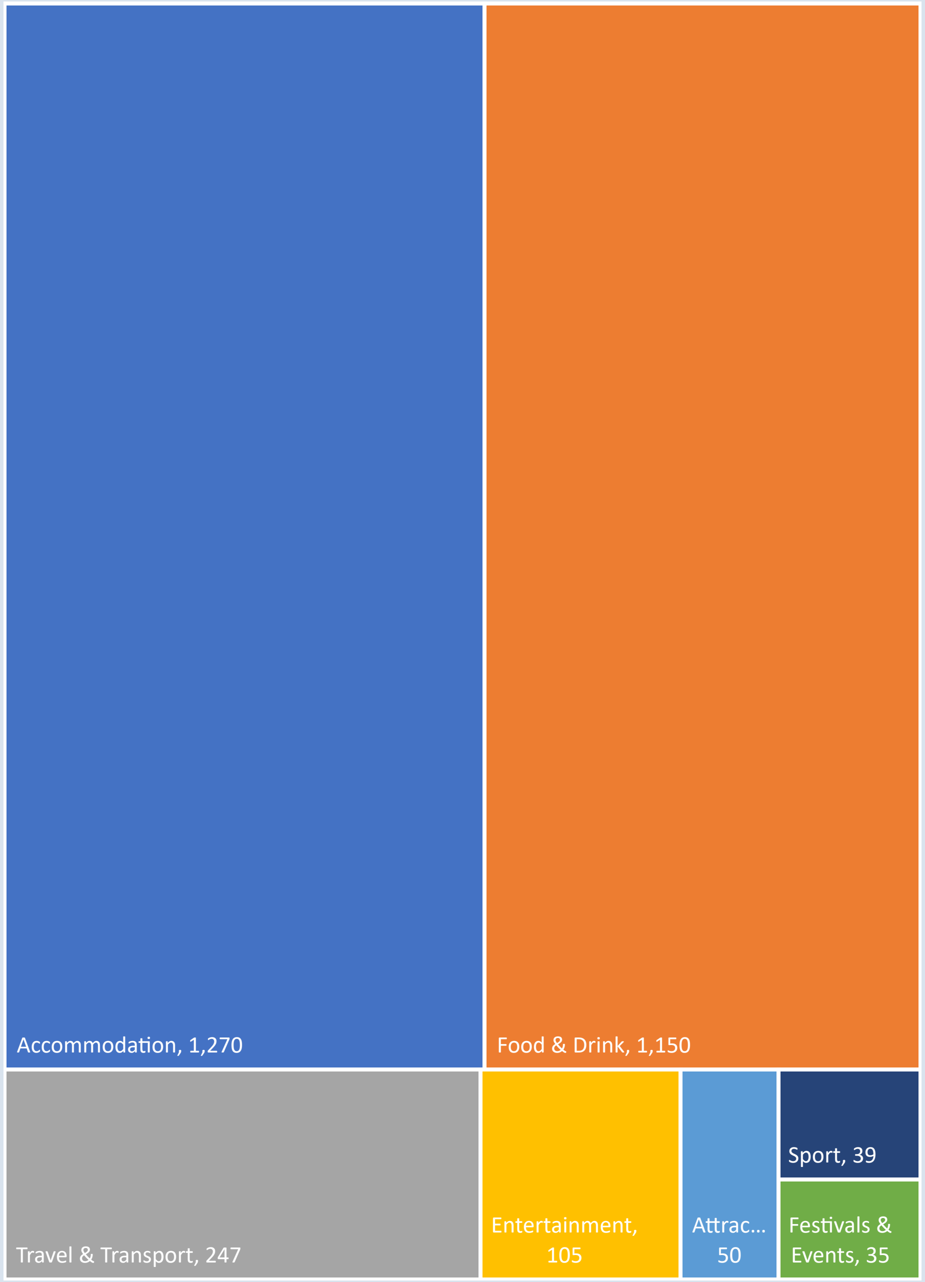
The word cloud uses 1,000 keywords drawn from the question inviting ideas to help guide future accommodation policy and the development of the new local plan. Of 259 comments, the most popular themes are public realm, investment and change of use. See the table below.

Clean up public realm	Investment	Change of Use	Regenerate or repurpose derelict bldgs	Visitor Attractions, Culture, Events	Fix Roads	Transport & Parking Innovation	Need Investment in Accomm.	Airbnb - negative impact	Innovation	Quality standards & Regulation	Infrastructure	Homeless people	Boost access and sustainability	Asylum Seekers & Refugees	Need to attract new markets
42%	38%	23%	22%	16%	16%	15%	15%	11%	11%	9%	9%	8%	7%	5%	3%

1. Some 330 residents responded to a short survey responding to questions on the benefits of tourism to the town, key concerns and opportunities. Table 1 shows strong general support for the industry and a recognition that benefits accrue to the town and businesses. The views that tourism accrues personal benefit was higher than in some other destinations, such as the Peak District, where the equivalent score was 2.78.
2. The large green dots shown in Table 2 represent postcodes identified as problematic by residents as far as the impact of Airbnb properties. Some 15% of respondents (49) indicated that Airbnb and other sharing economy activity created either a very negative or negative impact and these postcodes are mapped in Table 2. The pink shaded circles show two areas where there is likely to be a correlation between sharing economy short term lets and reported issues.
3. When asked about *Concerns* two thirds related to just five issues –
   - shabby streets and public realm (21%)
   - the impact of HMOs, refugees and other groups (15%)
   - the need for hotel investment (14%)
   - roads and transport (9%) and,
   - The impact of Airbnb (6%).
4. Table 3 presents the various Opportunities by theme. Six themes generate around half of all views, with strong support for:
   - new visitor attractions,
   - culture and events
   - cleaning up the public realm, transport, parking and investment in accommodation are opportunities as well as concerns.
   - improvements in quality standards and regeneration of public facilities.
5. 5% of residents see no opportunities available for the town which may indicate the need for a wider conversation about the town's Future Vision. The key messages from residents is that the Council need to do more on public realm, investment and enabling change of use.

6.1 Employment in Eastbourne's Visitor Economy

Figure 1. Visitor Economy Employment by Sector



Notes:

1. The dataset is the ONS Business Register and Employment Survey 2022 (NOMIS accessed 1/5/24). It is a survey of the number of jobs held by employees and the figures include businesses registered for PAYE. The employment numbers include both full-time and part-time .
2. The geographic area covered by the data is Eastbourne Borough.
3. Methodology - Each of 43 SIC codes relating to the visitor economy was selected. Some, such as accommodation and travel agency for example, can be considered to be 100% related to the visitor economy. Others, such as restaurants and bars, which see local population usage, had a factor applied to estimate usage by tourists. In the case of restaurants and bars for example it is estimated that 40% of sector turnover is sustained by visitors. See Appendix V.
4. Tourism South East (2015) The Economic Impact of Tourism Eastbourne

Figure 2. Employment Growth in the Formal Visitor Economy

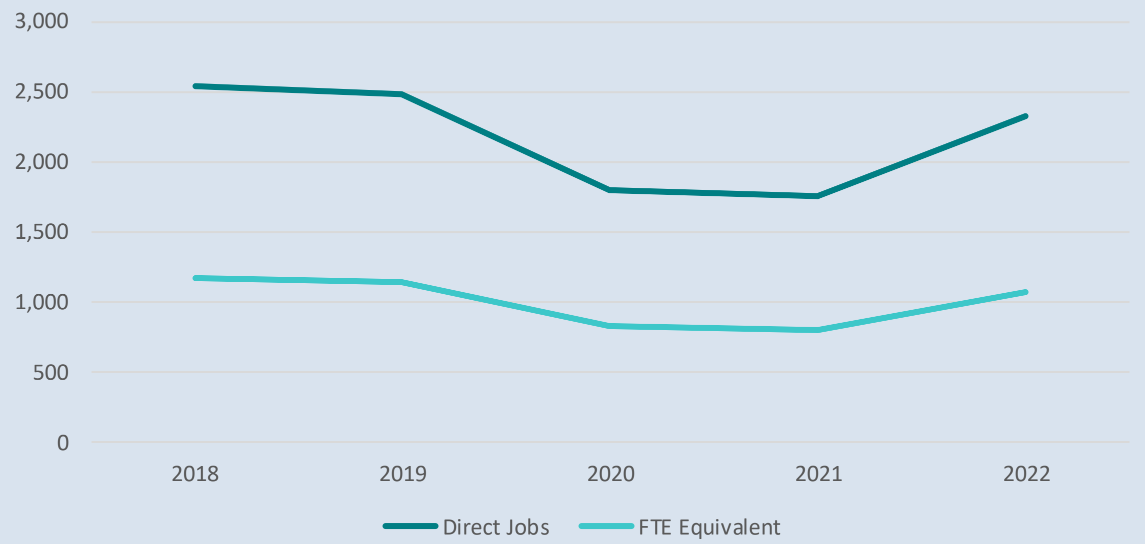
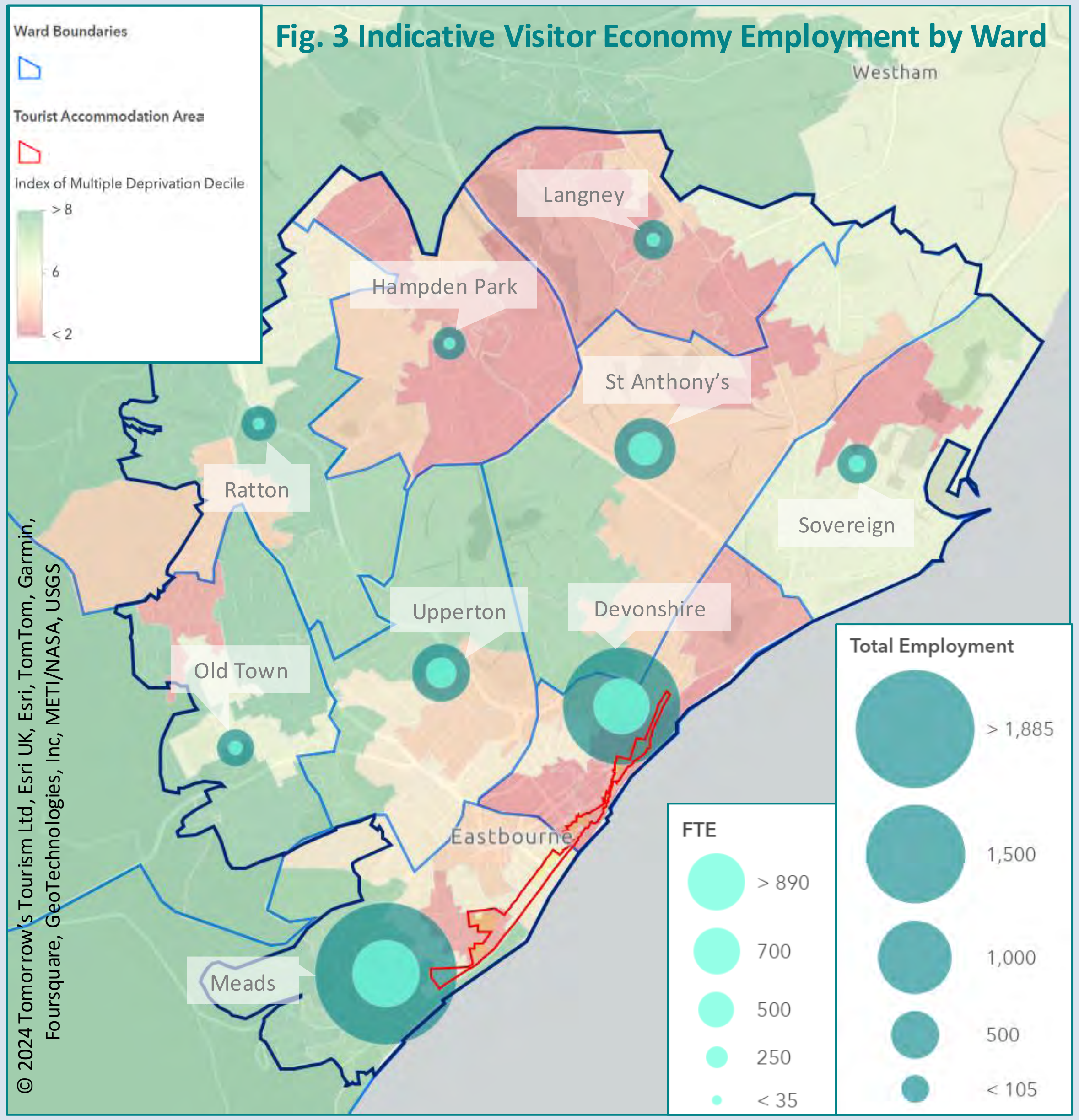


Fig. 3 Indicative Visitor Economy Employment by Ward



1. Fig. 1 shows total direct employment in the tourism economy as defined by the ONS.[1] This does not include employment in the informal visitor economy (e.g. often non-serviced accommodation or in related sectors) so understates the overall impact. From the ONS survey, 44% of jobs are provided by the accommodation sector with a further 40% in cafés, restaurants, pubs and other related.
2. There was a reduction of 27% in full time employment from 2019 to 2020, reflecting the COVID-19 crisis. By 2022 this figure was back up to just 7% below pre-pandemic levels.
3. Appendix V gives a detailed breakdown of jobs underpinned by visitor spending.
   - The broad Visitor Economy which is drawn from the ONS defined SIC codes as shown in Appendix V where some 5,405 jobs are sustained by spending in these service related businesses.
   - From this estimate we calculate the direct jobs that are likely to be underpinned solely by the expenditure of visitors to Eastbourne as well as those that are on day trips within the Borough. On this basis an estimated 2,896 jobs are sustained directly by the tourism economy across the Borough.
4. These direct tourism related jobs across the district equate to 1,332 jobs when measured on a Full Time Equivalent basis (FTE). A further 500 FTE jobs are derived from working owners and 233 FTE posts are estimated to be created by the 582 non-serviced establishments operating via Airbnb and other channels. These businesses are not likely to operate payroll and are less likely to be VAT registered. Total FTE jobs is estimated at 2,065 or some 7% of all FTE jobs in Eastbourne.
5. TSE [4], using the Cambridge model in 2015, reported higher FTE employment impact at 5,852 jobs including additionally indirect and induced employment (which implies that the visitor economy makes up 15% of FTE employment). This is taking into account supply chain impact and the spending of tourism employees within the local economy which would typically give rise to a multiplier of between 0.2 and 0.3.
6. Figure 3 maps formal employment per ward over the index of multiple deprivation - where green is less deprived and red more deprived. Tourism can create jobs rapidly and can support areas that have fallen behind.
7. The high levels of deprivation, in red on the map, shows some 29% of the town in very deprived deciles including parts of the TAA.

Appendix 1 Policy Framework – Summary of Key Documents

Policy Document	Relevance for Eastbourne Accommodation Study
Eastbourne Core Strategy (2013)	• **Policy D3: Tourism and Culture** - Recognises 'the vital role that tourism and culture play in Eastbourne's current prosperity. It identifies clear ways in which the Council will seek to maintain and enhance tourism and visitor facilities in the town.' • Importantly, it seeks to 'Resist the loss of visitor accommodation through the retention of a tourist accommodation area[2] and protection policy (amongst other criteria)'.
Eastbourne Borough Plan (2003, saved policies)	• **Policy T01: Tourist Accommodation Area** - States that *"within the tourist accommodation area[2], shown on the Proposals Map, planning permission will be refused for proposals which are incompatible with the tourist accommodation use".* • Examples of incompatible uses include proposed HMO uses. It is not considered appropriate to permit houses in multiple occupation in the tourist accommodation area - see Borough Plan H014, which states that: *"HMOs will not be permitted in the tourist accommodation area defined in Policy TO1."* • **Policy T02: Retention of Tourist Accommodation** - States that within the Tourist Accommodation Area (TAA), identified on the Proposals Map, planning permission will not be granted for the redevelopment or change of use of tourist accommodation to any other use. • In this Policy "tourist accommodation" means serviced tourist accommodation (Class C1 use) and serviced tourist accommodation. Only in exceptional circumstances will planning permission be granted for any other use. This means that the applicant must demonstrate that the continuing use of land as tourist accommodation is not viable. • The loss of tourist accommodation is strongly resisted by Policy T02 and although this policy seeks to retain tourist accommodation within the tourist accommodation area, alternative use of the premises can be allowed if it has been demonstrated that continuing the C1 use is not viable. Several factors are taken into account in determining viability, including location, and economic factors such as costs of repair, refurbishment and market value (amongst others). • **The Tourist Accommodation Retention SPD Policy TO3: Tourist Accommodation Outside the Designated Area** - Outside of the tourist accommodation area planning permission will be granted for the change of use of tourist accommodation to class C3 use (dwellinghouses) subject to Policy HO9 of this Plan. • **The Tourist Accommodation Retention SPD Policy TO4: Improvements to Existing Accommodation** - Developments and alterations which upgrade and improve the quality accommodation and other related facilities will be granted planning permission, subject to the residential and visual amenity considerations set-out in Policies HO20 and UHT4. • **The Tourist Accommodation Retention SPD Policy TO5: New Tourist Accommodation** - Within the tourist accommodation area planning permission will be granted for additional serviced (use class C1) and un-serviced tourist accommodation, subject to the residential and visual amenity considerations set-out in Policies HO20 and UHT4.
Eastbourne Town Centre Local Plan 2013	• The TCLP identifies objectives for the town centre including **Objective 8 (Supporting tourism and business)** which seeks to 'ensure the regeneration of the Town Centre contributes to Eastbourne as an important tourist and business destination including opportunities for providing a range of hotel uses through retention and enhancement of existing stock and through new development'. However, the policies of the TCLP lack specifics relating to tourist accommodation.

The Tourist Accommodation Retention SPD (2017)	• Although a supplementary document, The Tourist Accommodation Retention SPD 2017 is of particular importance in the assessment of planning applications.
	• This SPD provides additional detail on the interpretation of the following adopted local planning policies:
	    • Eastbourne Borough Plan Policy TO1: Tourist Accommodation Area
	    • Eastbourne Borough Plan Policy TO2: Retention of Tourist Accommodation
	    • Core Strategy Policy D3: Tourism and Culture
	• The SPD divides the Tourist Accommodation Area into Primary and Secondary Sectors. This is to ensure that the tourist accommodation that is within the prime and most popular areas is retained and poor-quality stock in less prominent locations can be reduced over time.
	• The SPD indicates areas of poor-quality stock in less prominent locations - i.e. those behind the seafront that do not have views onto the sea or front garden spaces. The full TAA remains relevant in assessing the appropriateness of proposed uses within the TAA, despite the identification of both Primary and Secondary areas. This means that, even if it can be demonstrated that a tourist accommodation unit is no longer viable against the relevant criteria set out in the SPD, a change of use to HMO would not be permitted due to its incompatible use (See Borough Plan HO14).

Further relevant policies	• **Borough Plan Policy TO9: Commercial Uses on the Seafront** – Planning permission will not be granted for the change of use of properties in King Edwards Parade, Grand Parade, Marine Parade, Royal Parade and Prince William Parade, to commercial or retail uses other than hotels and guest houses and their ancillary restaurants/bar facilities, unless the external appearance is unaltered and the proposed use is compatible with tourist accommodation. • **Borough Plan Policy HO14: Houses in Multiple Occupation** - Planning permission will be granted for the establishment and retention of Houses in Multiple Occupation (HMOs) provided they comply with residential, visual and environmental amenity considerations set-out in Policies HO20, UHT4 and NE28. HMOs will not be permitted in the tourist accommodation area defined in Policy TO1.

Notes:

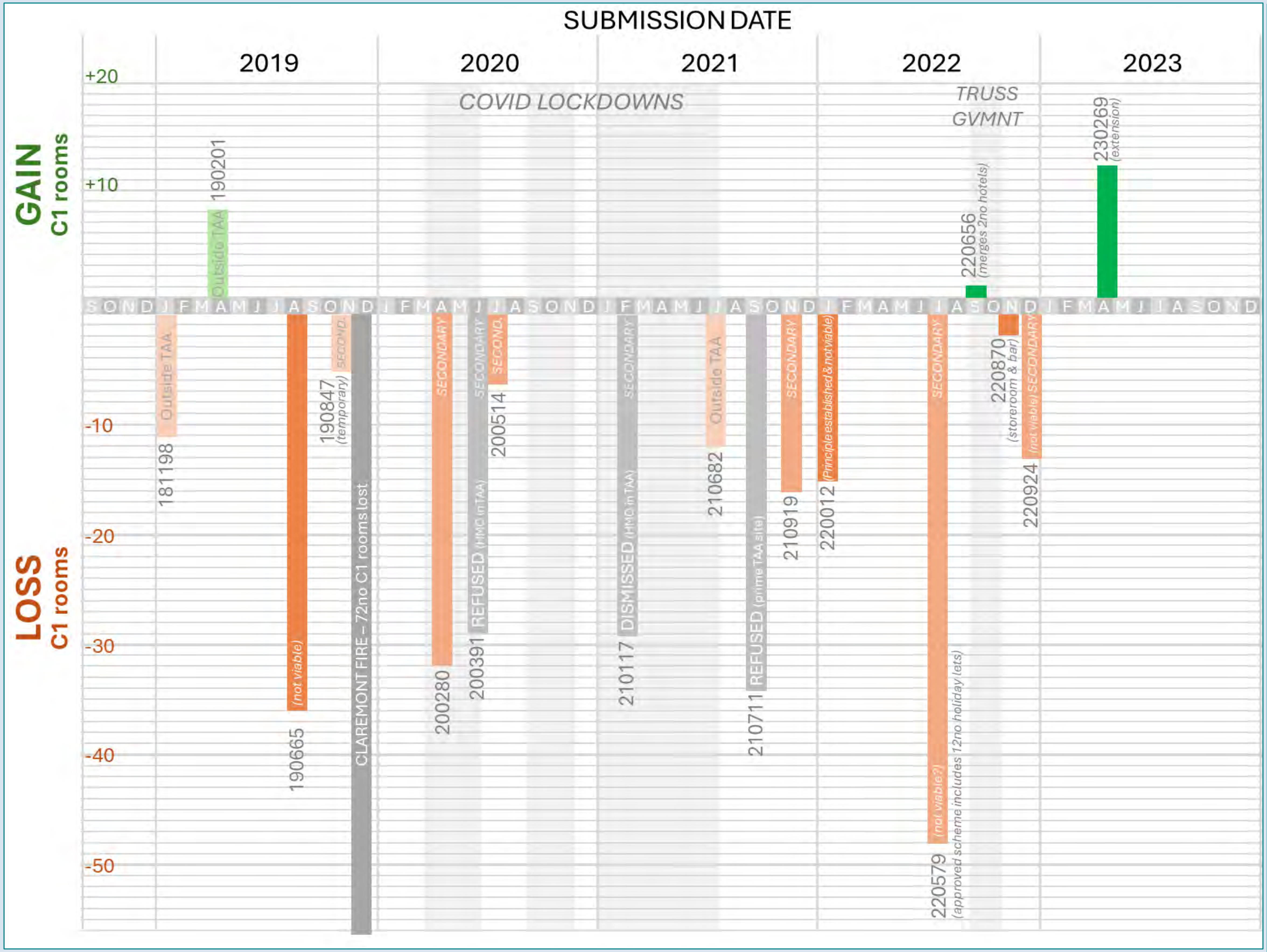
1. The table summarises the current development plan policies insofar as they relate to tourism – in particular, focusing on those involving change of use / retention of existing holiday accommodation.
2. The Tourist Accommodation Area is identified on: The Proposals Map (Borough Plan 2003); The Policy Map accompanying the Eastbourne Core Strategy 2013, and; The Tourist Accommodation Retention SPD2017 (it is noted that, unlike the Proposals and Policy Map, the SPD further divides the Tourist Accommodation Area into Primary and Secondary Sectors).

Appendix II TAA – Listing of Serviced and Non-Serviced Properties

Business Name	Address	Postcode	Sub Category
17 Wilmington Square	17 Wilmington Square	BN21 4EA	B&B / Guest House
Afton Hotel	2-8 Cavendish Place	BN21 3EJ	Hotel
Albany (Lions) Hotel / OYO Diamond Hotel Eastbourne	42-43 Grand Parade	BN21 4DJ	Hotel
Albert & Victoria Guest House	19 St. Aubyns Road	BN22 7AS	B&B / Guest House
Alexandra Hotel	King Edwards Parade	BN21 4DR	Hotel
Atlanta Guest House	10 Royal Parade	BN22 7AR	B&B / Guest House
Bassets House	72 Royal Parade	BN22 7AQ	B&B / Guest House
Bay Lodge Guest House	61 Royal Parade	BN22 7AQ	B&B / Guest House
Beach Front Guest House	13 Royal Parade	BN22 7AR	B&B / Guest House
Beamsley Lodge	86-87 Royal Parade	BN22 7AE	B&B / Guest House
Berkeley Guest House / The Berkeley Hotel	3 Lascelles Terrace	BN21 4BJ	B&B / Guest House
Brayscroft House	13 South Cliff Avenue	BN20 7AH	B&B / Guest House
Breakers Guest House	56 Royal Parade	BN22 7AQ	B&B / Guest House
Burlington Hotel	Grand Parade	BN21 3YN	Hotel
Cavendish Hotel	38 Grand Parade	BN21 4DH	Hotel
Cumberland Hotel	34-36 Grand Parade	BN21 3YT	Hotel
da Vinci Hotel Eastbourne	10 Howard Square	BN21 4BQ	Hotel
Devonia	74 Royal Parade	BN22 7AQ	B&B / Guest House
Devonshire Park Hotel	27-29 Carlisle Road	BN21 4JR	Hotel
East Beach Hotel	23-25 Royal Parade	BN22 7AN	Hotel
Eastbourne Reymar	2-4 Cambridge Road	BN22 7BS	B&B / Guest House
Eastbourne Riviera Hotel	26 Marine Parade	BN22 7AY	Hotel
Ebor Lodge	71 Royal Parade	BN22 7AQ	B&B / Guest House
Ellesmere	11 Wilmington Square	BN21 4EA	B&B / Guest House
Fairlands Hotel	15-17 Lascelles Terrace	BN21 4BJ	HMO
Garfield Guest House	90 Royal Parade	BN22 7AE	B&B / Guest House
Glastonbury Hotel	4-9 Royal Parade	BN22 7AR	Hotel
Grand Hotel	King Edwards Parade	BN21 4EQ	Hotel
Gyves Guest House (see notes)	20 St. Aubyns Road	BN22 7AS	B&B / Guest House
Haddon Hall Hotel	17 Devonshire Place	BN21 4AJ	Hotel
Hadleigh Hotel	14-22 Burlington Place	BN21 4AR	Aparthotel
Halcyon (see notes)	King Edwards Parade 8 South Cliff	BN20 7AF	HMO
Hotel Iverna	32 Marine Parade	BN22 7AY	B&B / Guest House
Hydro Hotel	Mount Road	BN20 7HZ	Hotel
Imperial Hotel	16 Devonshire Place	BN21 4AH	Hotel
Langham Hotel	43-49 Royal Parade	BN22 7AH	Hotel
Langtons Bed & Breakfast	85 Royal Parade	BN22 7AE	B&B / Guest House
Lathom Hotel (no information on Tripadvisor) No longer trading??	4-6 Howard Square	BN21 4BG	Hotel
Majestic Hotel	26-34 Royal Parade	BN22 7AN	Hotel
New England	60 Royal Parade	BN22 7AQ	Hotel
New Wilmington Hotel Bed and breakfast	25-27 Compton Street	BN21 4DU	Hotel
Number Ninety One	91 Royal Parade	BN22 7AE	B&B / Guest House
OYO Carlton Court Hotel	10 Wilmington Square	BN21 4EA	Hotel
OYO Marine Parade Hotel	13-14 Marine Parade	BN21 3DX	Hotel
OYO Oban Hotel	King Edwards Parade	BN21 4DS	Hotel
Pier Hotel	4 Grand Parade	BN21 3EH	Hotel
Port Hotel (previously Waterside Boutique Hotel)	11-12 Royal Parade	BN22 7AR	Hotel
Queens Hotel	Marine Parade	BN21 3DY	Hotel
Royal Hotel (Adults Only)	8-9 Marine Parade	BN21 3DX	B&B / Guest House
Savoy Court Hotel	11-15 Cavendish Place	BN21 3EJ	HMO
Sea Beach House Hotel	39-40 Marine Parade	BN22 7AY	Hotel
Seaview Sanctuary / Sea View Guest House	57 Royal Parade	BN22 7AQ	B&B / Guest House
Shore View Hotel	20 Marine Parade	BN22 7AY	Hotel
The Chatsworth Hotel	Grand Parade 1	BN21 3YR	Hotel
The Cherry Tree Guest House (see notes)	15 Silverdale Road Lower Meads	BN20 7AJ	B&B / Guest House
The Lansdowne Hotel Eastbourne (Best Western)	King Edward's Parade	BN21 4EE	Branded Budget Hotel
The Mowbray (see notes)	2 Lascelles Terrace	BN21 4BJ	B&B / Guest House
The View Hotel	Grand Parade	BN21 4DN	Hotel
Vernon Guesthouse	1 Compton Street	BN21 3BP	B&B / Guest House
West Rocks Townhouse	44-46 Grand Parade	BN21 4DL	Hotel
York House Hotel (Best Western)	14-22 Royal Parade	BN22 7AP	Branded Budget Hotel

Business Name	Address	Postcode	Sub Category
1 Bed in Eastbourne (88047)	2 Grand Parade Miramar House Flat	BN21 3EH	Self Catering Apartment
2 Bed in Eastbourne (EHC20)	37 Marine Parade	BN22 7AY	Self Catering House / Cottage
2 Bedroom flat 30 secs from seafront		BN21 4EH	Self Catering House / Cottage
29 Marine Parade - 3 apartments different owners (see	29 Marine Parade	BN22 7BB	Self Catering Apartment
3 Queens Gardens Sea View Apartment	3 Queens Gardens	BN21 3EF	Self Catering Apartment
33-34 Marine Parade - 8 apartments	33-34 Marine Parade	BN22 7AY	Self Catering Apartment
6 Queens Gardens	6 Queens Gardens	BN21 3EF	Self Catering Apartment
A spacious g/floor 1 bedroomed seaside apartment		BN21 4DL	Self Catering Apartment
Apartment on the Seaside opposite the Pier		BN21 3DX	Self Catering Apartment
AppleTree Hotel	14 Burlington Place	BN21 4AR	Aparthotel
Beach in Reach - group house	94 Royal Parade	BN22 7AE	Self Catering House / Cottage
Beachside Holiday Apartments	52 Royal Parade	BN22 7AQ	Self Catering Apartment
Beachview	23 Burlington Place	BN21 4AR	Self Catering Apartment
Beautiful 2 Bed Apartment Close to the Sea		BN21 3EG	Self Catering Apartment
Beautiful Bright Spacious Large Double Room & Bright spacious Room only		BN22 7BS	Room only
Bliss in the Bay Seaview Apartment in Eastbourne		BN22 7AX	Self Catering Apartment
By The Pier	3 Grand Parade Flat 2	BN21 3EH	Self Catering Apartment
Carlisle Court Holiday Flats (see notes) - MEADS One be	49 Carlisle Road	BN21 4JR	Self Catering Apartment
Charming Seaside Getaway		BN21 3YP	Room only
Citrus Hotel Eastbourne by Compass Hospitality - Seafro	King Edwards Parade	BN21 4EB	Aparthotel
Couples only flat in great Eastbourne location		BN21 4AH	Self Catering Apartment
Delightful Three Bedroom Maisonette in Eastbourne		BN21 3DY	Self Catering Apartment
Devonshire House Holiday Flats	Devonshire Place	BN21 4AJ	Self Catering Apartment
Duke Aparthotel	39 Carlisle Road	BN21 4JS	Aparthotel
Eastbourne Self-Catering Annex near seafront	12 Latimer Road	BN22 7BL	Self Catering Apartment
Escape to the tranquillity of Eastbourne		BN22 7BN	Self Catering House / Cottage
Flat 14 Luxury Seaside Apartment	5-11 Hartlington Place	BN21 3BS	Self Catering Apartment
Flat 2 Meads Apartment / Meads - Three Bedrooms Ap	Falcondale House 5 South Cliff Aven	BN20 7AH	Self Catering Apartment
Flat 3 Gresham House / Gresham House (luxury 2-bed	5-11 Hartington Place	BN21 3BS	Self Catering Apartment
Georges Holiday Home / 4 Bed House - Sleeps 12 (+ bab	Latimer Road	BN22 7BL	Self Catering House / Cottage
House by the sea		BN21 3DL	Room only
Huge Seafront Villa & Garden -Burlington Palace / Burlington Palace Eastbourne Seafront Vill		BN21 4BA	Self Catering House / Cottage
Jevington Gardens stylish 2 bedroom apartment / Spotl	14 Jevington Gardens	BN21 4HN	Self Catering Apartment
King Room with En Suite!		BN21 4DX	Room only
Luxury 2 bedroom + lounge apartment at seafront		BN21 4EW	Self Catering House / Cottage
Modern Seaside Apartment with Large roof terrace		BN21 4FB	Self Catering Apartment
One Queens Gardens Eastbourne.	Flat 9 1-2 Queens Gardens Ground	BN21 3EF	Self Catering Apartment
Osborne Aparthotel (on Booking.com as Arlo Apartment	35-37 Carlisle Road	BN21 4JS	Aparthotel
Pearl & Pebbles Eastbourne	12 Lascelles Terrace	BN21 4BL	Room only
Pied a terre by the sea		BN22 7AE	Self Catering Apartment
Pier Lookout	3 Grand Parade Flat 5	BN21 3EH	Self Catering Apartment
Pier Reflections - seafront apartment	1 Grand Parade	BN21 3EH	Self Catering Apartment
Pier12	26-28 Elms Avenue	BN21 3DN	Self Catering Apartment
Port Hotel Boutique Hotel - Apartments (see notes)		BN22 7AN	Room only
Premium Apartment & Studio Apartment & Luxury Superior Apartment & Superior Family Apa		BN21 4HP	Room only
Quirky artists flat		BN21 3DL	Self Catering Apartment
Ritz Apartments	31 Carlisle Road	BN21 4JS	Aparthotel
Sanctuary from busy bustling cities to relax		BN20 7AG	Self Catering Apartment
Sea Beach Cottage	38 Marine Parade	BN22 7AY	Self Catering House / Cottage
Sea Downs - moments from beach	41 Jevington Gardens	BN21 4EH	Self Catering Apartment
Sea Dreams - seafront apartment with fab sea views	South Cliff	BN20 7AF	Self Catering Apartment
Seabreeze Apartment	79 Royal Parade	BN22 7AL	Self Catering Apartment
Seafront apartment Balcony by Pier & Town Centre		BN21 3DX	Self Catering Apartment
Seaside En-Suite Double Room (A) / Seaside En-suite Tv	15 Latimer Road	BN22 7BN	Room only
Seaside Escape with Sea View		BN21 3DD	Room only
Single Room at Cromwell House		BN21 3DL	Room only
Skippers View Sunny Balcony	4 Marine Parade	BN21 3DX	Self Catering Apartment
Skyview Eastbourne 24 (previously Heatherleigh Hotel)	63-66 Royal Parade / Apt. 24	BN22 7AQ	Self Catering Apartment
Spacious Ground Floor Flat!		BN21 4BJ	Self Catering House / Cottage
Standard Family room with Ensuite Bathroom		BN21 4EE	Room only
Sunset Square Eastbourne 2 bed Apartment Seafront		BN22 7BB	Aparthotel
The Guesthouse East - 4* B&B - King /twin or triple suit	13 Hartington Place	BN21 3BS	Room only
Tom Thumbs Cottage - Historic Fishermans Cottage		BN22 7AT	Self Catering House / Cottage

Appendix III C1 Gains & Losses



1. The diagram shows an analysis of the last 5 years of Eastbourne planning history relating to C1 sites. The objective was to understand the general patterns of approval/refusal over time, the distribution of applications in regards to the Tourist Accommodation Area (TAA) and how decision-makers have been applying the TAA-related policies in practice.

2. The data range reflects submission/validation dates and cases have been identified by searching the portal for selected key terms (‘hotel’, etc.) and, therefore, may not be exhaustive. 30 applications have been identified within the 5-year period, though these include a number of LBC and minor works applications. It is noted that the officer report is missing from the portal for many applications.

3. There have been some very modest gains from recent decisions relating to isolated developments in the TAA, as follows:

   - 230269 proposed a 4 story resulting in 12no new guestrooms;
   - 220656 resulted in a net gain of 1no guestroom from the merger and extension of 2no adjoining hotels (though, as a consequence, resulting in the net loss of 1no business).

4. Patterns with time are not pronounced, though it could be interpreted that proposed C1 gains are either pre COVID-19 significantly post COVID-19 and that proposed C1 losses have loose clusters at the start and end of the COVID-19 lock downs and around the Truss Government.

Appendix IV Closed Property Listing

Business Name	Address	Postcode	Category	Sub Category	Re-branded	Changed use	Changed Cat.	Closed Unknown
Alfriston Hotel	16 Lushington Road	BN21 4LL	Serviced	Hotel				1
Ambassador Hotel	1-3 Howard Square	BN21 4BQ	Serviced	Hotel				1
Ambleside Private Hotel	24 Elms Avenue	BN21 3DN	Serviced	Hotel				1
Arden Hotel	17 Burlington Place	BN21 4AR	Serviced	B&B / Guest House		1		
Arundel Private Hotel (HMO?)	43-47 Carlisle Road	BN21 4JR	Serviced	Hotel				1
Ashley Grange Hotel	Lewes Road	BN21 2BY	Serviced	Hotel				1
Bay Tree Guest House	10 Elms Avenue	BN21 3DN	Serviced	B&B / Guest House				1
Bella Vista Guest House	30 Redoubt Road	BN22 7DH	Serviced	B&B / Guest House		1		
Boat House	93 Royal Parade	BN22 7AE	Serviced	B&B / Guest House				1
Boyne House Guest House	12 St Aubyn's Road	BN22 7AS	Serviced	B&B / Guest House				1
Cambridge House	6 Cambridge Road	BN22 7BS	Serviced	B&B / Guest House				1
Claremont Hotel - *burnt down*	5-10 Grand Parade	BN21 3YL	Serviced	Hotel				1
Coast Guest Accommodation	84 Royal Parade	BN22 7AE	Serviced	B&B / Guest House				1
Courtlands Hotel	3-5 Wilmington Gardens	BN21 4JN	Serviced	Hotel				1
Eastbourne Beach Holiday House	46 Blakes Way	BN23 6EN	Serviced	B&B / Guest House				1
Fairlands Hotel	15-17 Lascelles Terrace	BN21 4BJ	Serviced	HMO		1		
Family lodge Guest House	3 Elms Avenue	BN21 3DN	Serviced	B&B / Guest House				1
Gables Bed & Breakfast	21 Southfields Road	BN21 1BU	Serviced	B&B / Guest House				1
Gray's Hotel	18 Elms Avenue	BN21 3DN	Serviced	Hotel				1
Ivydene Hotel	5-6 Hampden Terrace, Latimer Road	BN22 7BL	Serviced	Hotel				1
La Mer Guest House (HMO!)	7 Marine Road	BN22 7AU	Serviced	B&B / Guest House				1
Lathom Hotel	4-6 Howard Square	BN21 4BG	Serviced	Hotel	1			1
Mansion Lions Hotel	Grand Parade	BN21 3YS	Serviced	Hotel		1		
Meridale Guest House	91 Royal Parade	BN22 7AE	Serviced	B&B / Guest House				1
OYO The Strand Hotel	35-42 Royal Parade	BN22 7AN	Serviced	Hotel		1		1
Park View Hotel	8 Wilmington Gardens	BN21 4JN	Serviced	Hotel				1
Pebble Beach B&B	53 Royal Parade	BN22 7AQ	Serviced	B&B / Guest House				1
Princes Hotel	Lascelles Terrace	BN21 4BL	Serviced	Hotel				1
Saffrons Hotel	30-32 Jevington Gardens	BN21 4HN	Serviced	Hotel				1
Sea Breeze Guest House	6 Marine Road	BN22 7AU	Serviced	B&B / Guest House				1
So Eastbourne Hotel	12-20 Lascelles Terrace	BN21 4BL	Serviced	Hotel	1			1
Southcroft Guest House / Southcroft Hot	15 South Cliff Avenue	BN20 7AH	Serviced	B&B / Guest House			1	
The Meads	22 Milnthorpe Road	BN20 7NS	Serviced	B&B / Guest House				1
The Sherwood Guest House	7 Lascelles Terrace	BN21 4BJ	Serviced	B&B / Guest House				1
Tudor House Eastbourne (HMO!)	Eastbourne 5 Marine Road	BN22 7AU	Serviced	B&B / Guest House				1
Waterside Boutique Hotel (now Port Hot	11-12 Royal Parade	BN22 7AR	Serviced	Hotel	1			
16 San Juan Court	16 San Juan Court	BN23 5TP	Non-Serviced	Self Catering Apartment				1
Breakaway Bungalows	Kings Park	BN23 6UE	Non-Serviced	Self Catering Apartment				1
Congress Apartments (Aparthotel)	31 -37 Carlisle Road	BN21 4JS	Non-Serviced	Aparthotel	1			
Dolphin House Holiday Flats	36 Marine Parade	BN22 7AY	Non-serviced	Self Catering Apartment				1
Eastbourne Holiday Rentals	Silverdale Road	BN20 7AN	Non-Serviced	Self Catering Apartment				1
Grand Apartment	Falcondale House	BN20 7AH	Non-Serviced	Self Catering Apartment				1
Grand Lodge	Falcondale House 5 South Cliff Avenue	BN20 7AH	Non-Serviced	Self Catering House / Cottage				1
Inviting 5-bed House in Eastbourne	35 Prideaux Road	BN21 2NB	Non-Serviced	Self Catering House / Cottage				1
Kings Park Bungalow	5 Fastnet Close	BN23 6UW	Non-Serviced	Self Catering Apartment				1
Marine Court Holiday Apartments	3 Marine Parade	BN21 3DX	Non-Serviced	Aparthotel				1
Mondrian Aparthotel	31-35 Carlisle Road	BN21 4JS	Non-Serviced	Self Catering Apartment	1			
Stagedoor Apartment	The Mansions 23 Compton Street	BN21 4AP	Non-serviced	Self Catering Apartment				1
Starling Rise Holiday Apartments	8 Marine Parade	BN21 3DX	Non-serviced	Self Catering Apartment				1
Travancore Holiday Apartments	Wilmington Gardens, Travancore Apartr	BN21 4JN	Non-Serviced	Self Catering House / Cottage			1	
White Stone House	24 Bourne Street	BN21 3ER	Non-serviced	Self Catering House / Cottage			1	
					5	5	3	41

1. To be read in conjunction with Annex III.
2. Closed properties details have been sourced from a range of sources and it is often that a digital trail remains.
3. We assume that many of the guest-houses and bed and breakfast have been subject to the normal churn, retired / resold and rebranded or changed category to non-serviced reflecting the national trend. Without evidence to the contrary however they have been allocated to the *Closed Unknown* category.

Appendix V Methodological Notes

ONS Crown Copyright Reserved [from Nomis on 1 May 2024] - Employment Estimates within the Formal Visitor Economy	Eastbourne		
	Unmodulated	Visitor Weighting	Direct Jobs
Industry Code		Factor %	TT Estimate
55100 : Hotels and similar accommodation	1,250	100%	1,250
55201 : Holiday centres and villages	0	100%	0
55202 : Youth hostels	0	100%	0
55209 : Other holiday and other short-stay accommodation	10	100%	10
55300 : Camping grounds, recreational vehicle parks and trailer parks	0	100%	0
55900 : Other accommodation	10	100%	10
56101 : Licensed restaurants	700	40%	280
56102 : Unlicensed restaurants and cafes	700	40%	280
56103 : Take away food shops and mobile food stands	350	40%	140
56210 : Event catering activities	225	40%	90
56290 : Other food service activities	150	40%	60
56301 : Licensed clubs	50	40%	20
56302 : Public houses and bars	700	40%	280
49100 : Passenger rail transport, interurban	200	50%	100
49311 : Urban, suburban or metropolitan area passenger railway transportation by underground, metro and similar systems	0	20%	0
49319 : Urban, suburban or metropolitan area passenger land transport other than railway transportation by underground, metro and similar systems	250	20%	50
49320 : Taxi operation	45	50%	23
49390 : Other passenger land transport nec	10	20%	2
50100 : Sea and coastal passenger water transport	20	50%	10
50300 : Inland passenger water transport	0	50%	0
51101 : Scheduled passenger air transport	0	50%	0
51102 : Non-scheduled passenger air transport	0	50%	0
77110 : Renting and leasing of cars and light motor vehicles	25	50%	13
77210 : Renting and leasing of recreational and sports goods	10	50%	5
77341 : Renting and leasing of passenger water transport equipment	0	50%	0
77351 : Renting and leasing of passenger air transport equipment	0	50%	0
79110 : Travel agency activities	35	100%	35
79120 : Tour operator activities	10	100%	10
79901 : Activities of tourist guides	0	100%	0
79909 : Other reservation service activities (not including activities of tourist guides)	0	100%	0
68202 : Letting and operating of conference and exhibition centres	0	100%	0
82301 : Activities of exhibition and fair organizers	20	100%	20
82302 : Activities of conference organizers	15	100%	15
90010 : Performing arts	35	20%	7
90020 : Support activities to performing arts	15	20%	3
90030 : Artistic creation	25	20%	5
90040 : Operation of arts facilities	100	20%	20
91020 : Museum activities	50	100%	50
91030 : Operation of historical sites and buildings and similar visitor attractions	0	100%	0
91040 : Botanical and zoological gardens and nature reserve activities	0	100%	0
93210 : Activities of amusement parks and theme parks	0	100%	0
93290 : Other amusement and recreation activities	100	50%	50
92000 : Gambling and betting activities	100	20%	20
93110 : Operation of sports facilities	175	20%	35
93199 : Other sports activities (not including activities of racehorse owners)	20	20%	4
Column Total	5,405		2,896
		FTE Total	1,332

Notes:

1. The table shows the SIC codes relating to the visitor economy, together with a weighting, that derive the direct jobs figures presented on Page 17. The weighting applied is prudent across the District. In some wards visitor relating spending in e.g. restaurants & cafes may be higher than 40%.
2. No high/ low ranges have been applied to the estimated figures. Giving such a range could be helpful in strategic terms.
3. Acorn's 2015 study reported a total of 5,332 direct FTE jobs which includes retailing as well as Accommodation, Catering and Entertainment categories above.

1. Study Area: Eastbourne Planning District, excluding the South Downs national park.
2. Data Sources: The data underpinning this review has been gathered from a range of sources. The Audit was underpinned by information from numerous websites and this may reflect operating businesses to a greater extent. Audit results are likely to reflect at least 95% of all available properties but there may well be omissions given data-sources used.
3. The formal visitor economy is defined in this report as companies registered with the PAYE system and sampled as part of the ONS Business Register & Employment Survey. Data is from 2022. The informal visitor economy is all those businesses that have been identified as having a web presence but that are not part of the formal visitor economy.
4. Every effort has been made to ensure accuracy of the data contained within this report. However with over 400 assets recorded from multiple sources, some inaccuracy is inevitable. Our apologies if any tourism assets have been misrepresented. Any errors at the individual asset level do not affect the strategic assessment.
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