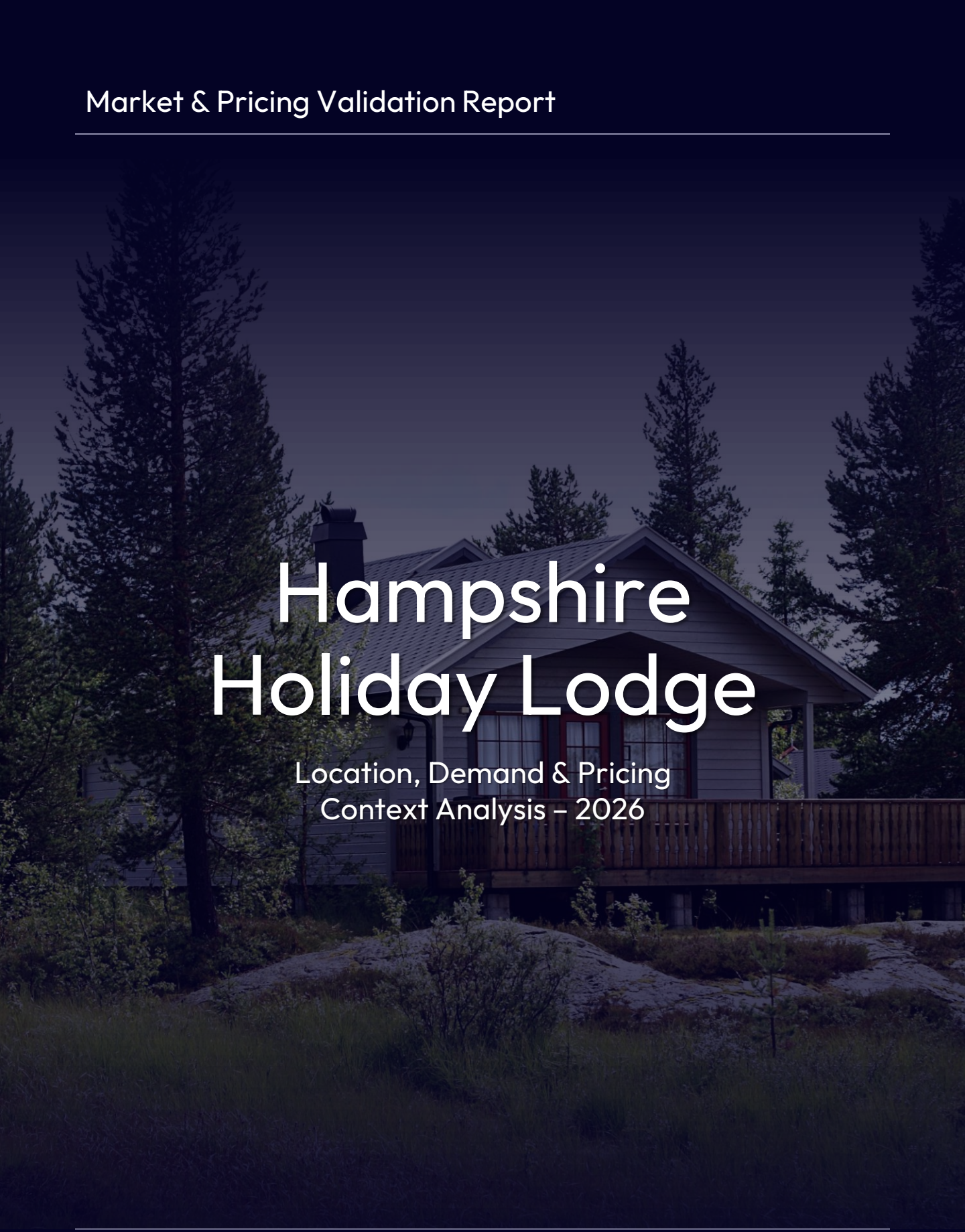
Market & Pricing Validation Report



Hampshire Holiday Lodge

Location, Demand & Pricing Context Analysis – 2026

Prepared For

GLOBAL PHOENIX



01

Executive Summary

This section provides a structured overview of the report objectives, key findings and overall market positioning conclusions for the Hampshire holiday lodge development.

Executive Summary

Report Objective

This report provides structured market context for Hill Farm, located in Sherfield English, Hampshire (SO51 6FP), and evaluates the positioning of premium three-bedroom holiday lodges in relation to the £299,995 pricing benchmark.



The analysis aims to

- Assess UK holiday lodge market fundamentals
- Evaluate Hampshire and New Forest tourism demand
- Benchmark regional and national premium lodge pricing
- Review the competitive landscape and supply constraints
- Contextualise the £299,995 price point against observable market evidence

The report draws on publicly available tourism data, regional economic indicators and comparable pricing evidence to support investor consideration.

This document is provided for market context only and does not constitute financial, legal or investment advice.

Executive Summary

Key Findings

- Hampshire benefits from strong domestic tourism fundamentals and established regional infrastructure.
- New Forest National Park status strengthens destination appeal and moderates new supply through planning controls.
- Paultons Park attracts 1m+ visitors annually, supporting family-led short-break demand in the local catchment.
- Premium 3-bed lodge purchase prices in prime markets typically range c. £360–£470 per sq ft, above the implied benchmark at £299,995.
- Protected landscape designations and regional planning constraints limit large-scale new leisure accommodation supply.
- Available comparable evidence positions £299,995 within the recognised South of England premium pricing range.



Conclusion Summary

The Hampshire location combines established tourism infrastructure, London-accessible connectivity and adjacency to the New Forest National Park, supporting sustained leisure demand.

Based on comparable purchase price evidence and regional tourism indicators, the £299,995 benchmark aligns within the South of England premium lodge corridor while remaining below ultra-prime national park and coastal pricing levels.



02

UK Holiday Lodge Market Overview

Market trends, tourism fundamentals and the role of holiday lodges as a leisure accommodation asset class.

UK Market Overview

UK Tourism Trends

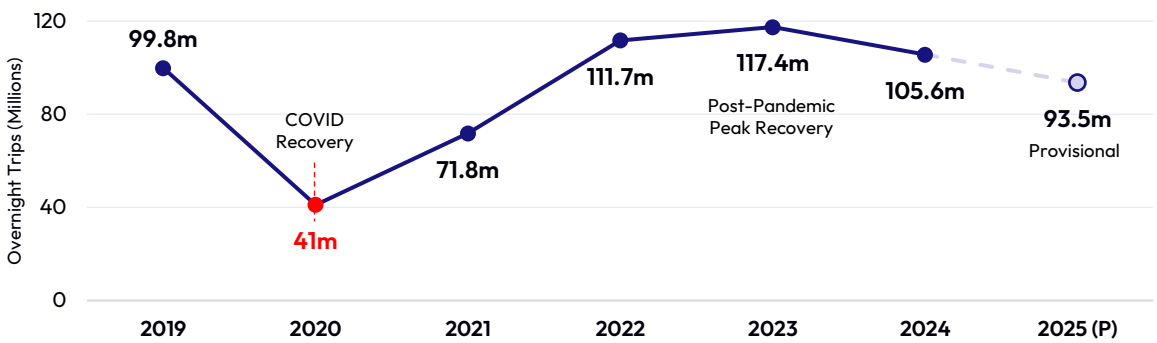
UK domestic tourism remains a significant component of leisure demand. VisitBritain and Office for National Statistics data indicate domestic overnight trip volumes remain elevated relative to pre-2020 baselines.



Key structural characteristics include

- Sustained participation in domestic overnight trips
- Greater flexibility in travel patterns linked to hybrid and remote working
- Increased short-break frequency in rural and nature-led destinations
- Continued preference for experience-led accommodation formats

UK Domestic Overnight Trips



Source: VisitBritain / Office for National Statistics

The combination of domestic and international visitor activity provides a dual-demand base for established UK leisure markets.

UK Market Overview

Holiday Lodges as an Asset Class

Holiday lodges sit within the discretionary leisure accommodation segment and differ from conventional residential buy-to-let property in both demand drivers and operating model.

Demand is primarily driven by tourism and short-stay leisure activity

Site operators typically manage operations under structured agreements

Key distinctions include



Income is linked to occupancy and achieved daily rates rather than long-term tenancies

Seasonality is influenced by peak holiday periods and regional tourism cycles

Performance varies materially by location quality, accessibility, amenity provision and operator capability. Established National Park, coastal and experience-led destinations have historically shown stronger occupancy and pricing depth than secondary leisure markets.



03

Hampshire & New Forest Tourism Analysis

Regional tourism drivers, accessibility advantages and local demand dynamics.

Tourism Analysis

Hampshire Visitor Volume

Hampshire is an established South of England leisure destination, generating substantial annual visitor activity and a significant tourism-related economic contribution.

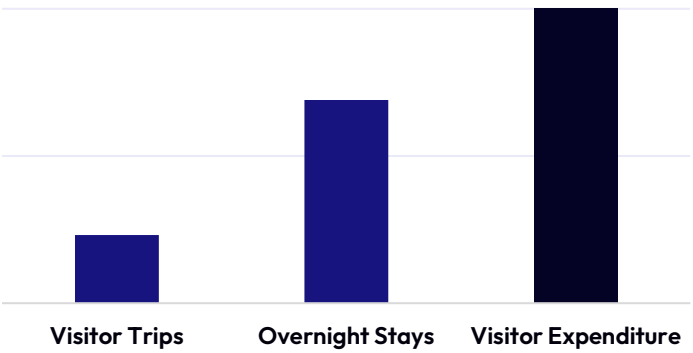


Tens of millions of annual visitor days generate several billion pounds in tourism expenditure across Hampshire, according to regional tourism impact assessments.

Structural characteristics include

- Established tourism infrastructure
- Diverse coastal and New Forest countryside positioning
- Strong short-break participation
- High levels of repeat domestic visitation

Hampshire Visitor Volume and Economic Impact



23.2 Million
Visitor Trips

69 Million
Overnight Stays

3.6 Billion+
Visitor Expenditure

Source: Hampshire County Council / Regional Tourism Impact Reports

The scale of regional tourism activity provides a broad demand foundation for leisure accommodation across the county.

Tourism Analysis

New Forest National Park

The New Forest National Park is a nationally protected landscape with strong visitor recognition and consistent domestic tourism appeal.



Key structural characteristics include

- Planning controls that limit large-scale new development
- Year-round visitor demand profile
- Established national destination branding
- Strong family and short-break market orientation

Protected landscape designation moderates accommodation supply relative to unrestricted rural locations, contributing to a structurally constrained market environment; however, no inference is made regarding future pricing performance.

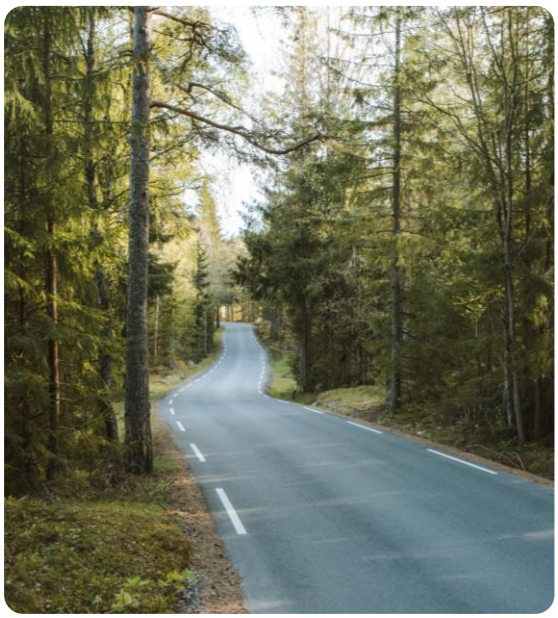
Tourism Analysis

Accessibility & Catchment Strength

The location benefits from strong regional connectivity, supporting short-break demand and positioning the site within reach of a large South East population base.

Approximately 80–90 minutes rail connectivity to London Waterloo places the site within practical reach of the London commuter catchment.





Additional strengths include

- Direct rail access to London
- Proximity to Southampton employment and infrastructure
- Road connectivity across the wider South East

Tourism Analysis

Demand Drivers & Pricing Environment

Paultons Park Visitor Driver

Paultons Park (including Peppa Pig World) attracts **1m+ visitors** annually, providing a major family tourism anchor within the local catchment. Large-scale attractions of this type typically support short-stay accommodation demand in surrounding areas



Source: Paultons Park public disclosures and regional tourism commentary.

Regional Affluence & Pricing Environment

Hampshire sits within the South East, a region with median earnings above the UK average. Office for National Statistics data indicates:



While holiday lodges are not residential property, regional economic conditions help frame the wider discretionary spending environment.

- Earnings above national benchmarks
- Above-average residential pricing levels
- Strong owner-occupation base
- London connectivity supporting purchasing power

Source: Office for National Statistics – Regional Earnings and Housing Data.



04

Supply & Competitive Landscape

Comparison of regional lodge supply and national premium pricing benchmarks.

Supply & Competition

Regional Lodge Competition

A review of comparable premium three-bedroom lodge schemes across Hampshire and neighbouring counties indicates an established regional pricing corridor for leisure accommodation of broadly similar specification.

Observed characteristics include

- Purchase prices typically c. £275,000–£400,000, depending on specification, location and amenities
- Internal floor areas and build standards vary across schemes
- Positioning differs by on-site facilities and proximity to key tourism anchors



Comparable evidence focuses on premium three-bedroom lodges across rural, coastal and national park-adjacent locations.

Scheme / Park	Location	Bedrooms	Internal Area (sq ft)	Purchase Price (£)
Forest Edge Lodges	Hampshire	3 Bed	860	£299,995
Green Meadow Lodges	Hampshire	3 Bed	900	£315,000
South Coast Lodge Park	Hampshire	3 Bed	970	£380,000
Coastal Pines Retreat	Dorset	3 Bed	880	£325,000
Oakwood Leisure Park	Sussex	3 Bed	920	£340,000
New Forest View Lodges	New Forest Area	3 Bed	850	£335,000
Silver Lake Lodges	Dorset	3 Bed	940	£365,000
Heritage Valley Lodges	Wiltshire	3 Bed	910	£275,000

The table summarises scheme-level data including internal area, advertised purchase price and implied £ per sq ft benchmarks.

Supply & Competition

National Premium Benchmarks

Premium national park and prime coastal leisure markets typically exhibit higher purchase price benchmarks on a £ per sq ft basis than the regional Hampshire corridor.

Illustrative advertised purchase benchmarks include

Lake District National Park

£470

per sq ft and above

Prime Cornwall coastal locations

£420

per sq ft and above

Core New Forest premium schemes

£385

per sq ft and above

Chart Premium UK Lodge Market Positioning (£ per sq ft)



Source: Market sample of advertised purchase prices, 2024–2025 (regional lodge listings and operator materials).

These figures reflect advertised purchase prices at the time of data capture and may vary by specification, operator quality and exact location. The range of benchmarks across markets highlights the influence of location quality, protected landscape status and destination recognition on pricing. No assertion is made regarding achieved prices.

Pricing Benchmark

Relative Positioning

At a purchase price of £299,995, the subject three-bedroom lodges imply a benchmark of approximately £340–£350 per sq ft (subject to confirmed internal area).

The subject pricing therefore sits

- Below prime national park and ultra-prime coastal benchmarks
- Within the lower to mid-range of the South East premium corridor
- Below the observed core New Forest premium pricing tier



This positioning reflects adjacency to a nationally recognised landscape while remaining below the highest established prime pricing benchmarks. No inference is made regarding future capital appreciation.



Risk Considerations

Demand Sustainability & Risk Considerations

The following factors outline key demand and risk considerations relevant to holiday lodge performance and should be taken into account when reviewing market positioning.

Seasonality

Demand is seasonal, with peak and off-peak occupancy patterns.

- Short breaks are extending beyond traditional peak windows
- Hybrid working supports more flexible mid-week travel

Economic Sensitivity

Holiday accommodation is discretionary spend and can react to macro conditions.

- Interest rates and consumer confidence
- Inflation and disposable income pressure

Regulatory Environment

Operations sit within local planning and environmental frameworks.

- Planning / site license requirements
- Potential changes to short-term letting rules

Exit Liquidity

Resale depth varies and is not comparable to mainstream residential property.

- Driven by location, operator quality and ongoing demand
- Influenced by asset age, condition and scheme reputation

Conclusion

Strategic Positioning & Conclusion

Hampshire benefits from established tourism infrastructure, New Forest adjacency and London-accessible connectivity, supporting sustained leisure demand.

Key structural considerations identified within this report include

- Established visitor volumes across Hampshire
- Moderated development supply within protected landscapes
- London-accessible short-break catchment
- Observable regional premium lodge pricing corridor
- Benchmarks below ultra-prime national park and coastal markets

On comparable pricing and demand indicators, the £299,995 benchmark sits within the South of England premium range and below established prime national park levels.



Conclusion

This conclusion reflects advertised pricing evidence and publicly available tourism data at the time of analysis. No projection is made regarding future capital performance or income generation.

Disclaimer

This report has been prepared for general market context and informational purposes only in relation to Hill Farm Lodge, Sherfield English. It does not constitute legal, financial, tax, investment or regulatory advice, and should not be relied upon as a substitute for independent professional advice.

Investing in property or holiday lodge schemes involves risk. Values may fluctuate and investors may not recover the full amount invested. Past performance is not a reliable indicator of future results.

All pricing benchmarks referenced are based on publicly available advertised data at the time of analysis. No representation is made regarding achieved sales values, future pricing performance, occupancy levels or income generation.

This report does not purport to contain all information a prospective investor may require and may be subject to revision or update without notice.

GLOBAL PHOENIX

Enquiries & Further Information

020 806 40759
info@globalphoenix-group.com
globalphoenix-group.com

Klinfield House
Foundry Business Park
Essex SS5 4HS