SUSSEX AND BRIGHTON & HOVE VISITOR ECONOMY BASELINE REPORT

REPORT FOR THE SUSSEX VISITOR ECONOMY INITIATIVE

SEPTEMBER 2023

CONTENTS

1 BACKGROUND & SUMMARY FINDINGS

This document is an update to the comprehensive evidence base from 2021 which informed the development of the Sussex visitor economy vision. As such, this document takes the previous evidence report as its basis and has been revised to include the latest available data, policies, strategic initiatives and market information in order to develop a new strategy for Sussex designed to grow the visitor economy over the course of this decade and achieve key targets aligned to the vision.

Many of the findings from the 2021 evidence base remain relevant today. However, at each section summary and throughout the report, we have highlighted where new information helps to build an up-to-date picture of the challenges and opportunities facing Sussex as it seeks to strengthen collaboration and leverage its assets as a modern and innovative destination.

KEY FINDINGS

- In 2019 the visitor economy proved to be a significant economic driver for Sussex – delivering £5bn of impact, attracting 62m visitors and supporting 74,000 full-time-equivalent jobs. Staying visits (11% visits and 50% spend) and overseas staying visits in particular (2% visits and 19% spend) were very significant for Sussex with above England-average spend and visitor numbers. In this context, the overseas market provides an opportunity for accelerated post-pandemic growth given the value potential international visitors present.
- The Sussex vision to build a year-round sustainable visitor economy as big as Wales by 2030 by attracting higher value staying visitors could result in a £2.5bn increase in economic impact and the creation of an additional 35,000 jobs by the beginning of the next decade. However, these outcomes will only be achieved through collaborative working across the whole of Sussex.
- The Tourism Recovery Plan has helped to give a national focus to supporting both sector recovery and future growth. The plan is a springboard to a range of policy initiatives including improving accessibility and inclusion, supporting sustainable travel, growing business events and addressing the fragmented nature of England's tourism management landscape via the Local Visitor Economy Partnership (LVEP) accreditation scheme. The UK visitor economy is forecast to grow over the next decade – potentially growing to 10% of the UK economy if backed by a supportive policy environment.

- Tourism is in Sussex's economic DNA and local plans recognise its importance in driving growth and jobs and are supportive of sustainable development across the county. However, without a formalised pan-county approach to destination management, development and marketing, fragmentation between localities remains an issue and means that the Sussex visitor economy is yet to maximise its full potential. A fragmented approach also means the visitor economy is unlikely to attract the attention it deserves when it comes to influencing inward investment, infrastructure development and sustainable transport solutions.
- The Sussex Visitor Economy Initiative (SVEI) has done much to demonstrate the benefits of pan-county collaboration, achieving some notable successes via partnership working to create a focus around high-value target markets, support the development of Sussex wine tourism and raise the county's profile among business and conferencing audiences. A Sussex LVEP would provide the opportunity to build upon the momentum established by the SVEI and its partners, support further collaboration and address fragmentation in the provision of the county's tourism services.
- The UK meetings and incentive market (MICE) has experienced strong post-pandemic recovery and offers notable growth potential, particularly out of season.
- Even before the pandemic, the global travel market was becoming increasingly competitive. In the face of increased competition destinations need a clear positioning that is easily articulated and that drives an emotional connection with visitors. Work to develop a compelling Sussex visitor story is underway via the SVEI and will play a significant role in shaping a cohesive approach to destination marketing that all partners can buy into and which will raise the profile of Sussex and destinations within the county – both domestically and internationally.
- Sussex has a diverse offer which justifies visitors spending time in the county to experience its rich variety. However, people need to understand the depth and breadth of the offer. Therefore, partnership working across local authority boundaries is essential to encourage visitors to experience more, stay longer and spend more across Sussex.
- As in 2021, there are gaps in Sussex visitor data in terms of market insights and visitor surveys. A consistent pan-Sussex approach to data collection – including economic impact modelling – would enable the effective sharing of intelligence across partners and promote a common understanding of the challenges and opportunities facing the Sussex visitor economy.
- Market data suggests short-term lets have grown exponentially in Sussex since July 2021. AirDNA data shows almost 5,000 additional short-term lets have come to market over the last two years – an increase of more than 80%. While this may indicate a buoyant visitor economy responding to consumer demand, such rapid growth is likely to add to pressures on the private rented sector and housing supply and is therefore a challenging concern for many local communities.

- While the cost-of-living crisis is a key issue for many domestic travellers, Sussex has the opportunity to target audiences who are less price-conscious and who are willing and able to invest in experiential travel by tapping into their needs and motivations for breaks and holidays offering unique experiences.

2 STRATEGIC & POLICY ENVIRONMENT

KEY POINTS

- DCMS's March 2023 update on the delivery of the Tourism Recovery Plan shows a mixed picture in the post-pandemic recovery of the UK visitor economy. While domestic visitor numbers are estimated to have reached 2019 levels, international visits and spend are currently forecast to return to pre-pandemic levels only by the end of 2024. The USA is buoyant but East Asian markets, including China, have yet to rally.
- In the business events sector, the domestic market is also showing signs of a strong recovery with more than 80% of UK conference venues saying that domestic enquires are the same or higher than 2019 levels in recent research.
- The Government's response to the de Bois Review of England's Destination Management Organisations has resulted in the roll out of the Local Visitor Economy Partnership (LVEP) accreditation scheme. The scheme is intended to deliver c.40 strategically focused local 'tourist boards' across England who will lead, manage and market destinations at a city region or county level. The application for a Sussex LVEP is currently in development, led by the Sussex Visitor Economy Initiative (SVEI), and is intended to build upon the momentum thus far established by cross-county partnership working.
- Given the exponential growth of the short-term lets market, two important regulatory changes affecting this sector are likely to become law during 2024/25. Legislation for a Tourism Accommodation Scheme in England is currently going through Parliament and a public consultation on proposed planning changes for short-term lets has also been launched.
- Improving inclusivity and accessibility is a key aim of the Tourism Recovery Plan. Therefore, investment in infrastructure and accessible transport is a stated priority of the Government and may unlock funding for destinations who can demonstrate a commitment to developing an inclusive and accessible offer.
- As a consumptive sector, sustainability is a vital issue for tourism. The Government has committed to issuing updated guidance on Local Transport Plans to support decarbonisation by late 2023 and will also develop a Sustainable Tourism Plan in 2024 in partnership with VisitBritain and the Tourism Industry Council. The implications of these plan will therefore influence the future evolution and implementation of a Sussex Destination Management Plan.
- Since its inception in late 2020, the Sussex Visitor Economy Initiative (SVEI) has sought to harness the opportunities offered by cross-county working to support the recovery and growth of the visitor economy. The aim of the SVEI and its partners is to work together to deliver an additional £2.5

billion in impact by 2030 and support the creation of 35,000 new jobs. In 2021 the strategic interventions around destination development, marketing and management were identified which would be necessary to achieve these growth ambitions were identified. Since that time, the SVEI has taken the lead on a range of collaborative projects to bring Sussex closer to meeting its goals. Key achievements to date include defining the key target markets most likely to drive Sussex value growth, an ambitious new prospectus for the growth of Sussex wine tourism, a project to develop a bold and resonant destination positioning and enhancing the county's profile as a compelling proposition for the meetings and incentives (MICE) market.

- A review of local plans and policies in Sussex demonstrates that the county's local authorities recognise the importance of the visitor economy to the wider economy. There is also a recognition of the opportunity to leverage the strengths of individual places and assets by partners working together across local authority 'lines' to encourage visitors to do more, dwell longer and spend more across the in the county. A cohesive partnership approach to destination development, marketing and management is acknowledged as being essential to unlocking Sussex's full potential.

NATIONAL CONTEXT

UK Industrial Strategy: Tourism Sector Deal 2019, UK Government

The Tourism Sector Deal sets out how the government and industry will work in partnership to boost productivity, develop the skills of the UK workforce and support destinations to enhance their visitor offer.

Build Back Better: our plan for growth, HM Treasury, March 2021

'Build Back Better: our plan for growth' sets out the government's plans to support growth through significant investment in infrastructure, skills and innovation, and to pursue growth that levels up every part of the UK, enables the transition to net zero, and supports the vision for Global Britain. The plan supersedes the government's 2017 Industrial Strategy.

Local Transport Plans & Transport Decarbonisation

The Department for Transport (DfT) will update its guidance for Local Transport Plans (LTPs) in late 2023. In the future, LTPs will need to set out how local areas will deliver quantifiable carbon reductions in transport, considering the different requirements of different areas. Following a public consultation, the updated guidance will be published along with additional standalone quantifiable carbon reductions (QCR) guidance. The QCR guidance, when used as a part of the LTP development process, will help local authorities make long term, evidence-based plans for local transport by considering the carbon impacts at a strategic planning stage.

The Landscape Review – Strengthening Areas of Outstanding Natural Beauty (AONBs)

The review recognised the vast majority of AONBs are indistinguishable from National Parks and are just as important for people and nature but lack equivalent recognition in law or support in resources. A new proposal therefore called for "AONBs strengthened with new purposes, powers and resources, renamed as National Landscapes" so that the national significance of our AONBs should be reflected in their name.

The Government are testing the proposal to rename AONBs as 'National Landscapes' as any name change must represent a step change for AONB teams with the ambitious new title encompassing new purposes delivered by skilled teams, sustainable funding and robust governance. Pulled together as a package these proposals have the potential to deliver a transformational approach to AONB leadership and management, particularly in regard to the visitor economy. Sussex has two AONBs – the High Weald and Chichester Harbour. Both organisations are working on developing the next versions of their management plans for 2025-2030 and which will take into account findings from the Landscape Review.

Tourism Recovery Plan, Department for Culture, Media and Sport (DCMS)

In June 2021, the UK government published its Tourism Recovery Plan in recognition of the impact of Covid-19 and the value of tourism to the economy. The plan outlined six objectives:

1. **To swiftly recover to pre-pandemic levels of domestic and international visitor volume** (recover overnight domestic volume and spend to 2019 levels by the end of 2022; inbound visitor numbers and spend by the end of 2023)
2. **To ensure that tourism benefits every nation and region** (longer visits; increased accommodation occupancy rates in the off-season; and high levels of investment in tourism products and transport infrastructure)
3. **To build back better with a more productive, innovative and resilient tourism industry** (maximising the potential for technology and data to enhance the visitor experience; and employing more UK nationals in year-round quality jobs)
4. **To ensure the tourism industry contributes to the enhancement and conservation of the country's cultural, natural and historic heritage and minimises damage to the environment**
5. **To ensure the tourism industry provides an accessible and inclusive offer that is open to all** (by aiming for the UK to be the most accessible tourism destination in Europe by 2025)
6. **To make the UK a leading European nation for hosting business events**

The Government published an Update on Delivery in March 2023. Updates on achievements to date and next steps have been provided against each of the six objectives:

Objective 1: To swiftly recover pre-pandemic levels of domestic and international visitor volume and spend

- The picture of recovery is a mixed one. Domestic visitor numbers appear to have recovered up to or close to 2019 levels.
- However, international visitor numbers and spending remain below 2019 levels. The Government's aim is now to recover 2019 levels of inbound visitors and spend by the end of 2024.

Objective 2: To ensure that tourism benefits every nation and region

- The government is taking steps to support regional tourism by taking forward the de Bois Review of Destination Management Organisations (DMOs), with the aim of supporting regional areas to better attract and manage tourists. This includes the introduction of the new Local Visitor Economy Partnership (LVEP) accreditation scheme and the Destination Development Partnership in the North East (the pilot of a multi-year core funding model).
- The £4.8bn Levelling Up Fund (LUF) will provide infrastructure investment to March 2025, and the £2.6bn UK Shared Prosperity Fund (UKSPF) designed to support local investment across the same period can fund interventions to support the visitor economy.
- Furthermore, the Government is exploring ways to raise domestic and international awareness of unique local food and drink cultures across the country.

Objective 3: To build back better with a more productive, innovative and resilient tourism industry

- In April 2023 DCMS published a consultation for a Tourism Accommodation Registration Scheme in England to increase the effective use of data on short-term lets. It is anticipated that the register would be operational from 2024 via an amendment to the Levelling Up and Regeneration Bill (LURB) to provide local authorities with data on how premises are being let out in their area and inform local approaches to managing the housing market.
- In parallel, the Department of Levelling Up, Communities and Housing (DLUCH) has published a consultation on proposed planning changes to use classes and permitted development rights for short-term lets.
- Skills and labour: the government is investing £25bn in the National Skills Fund until 2025 to help people gain skills, including in the hospitality sector.

Objective 4: To ensure the tourism industry contributes to the enhancement and conservation of the country's cultural, natural and historic heritage and minimises damage to the environment

- The Government, VisitBritain and the Tourism Industry Council will develop a Sustainable Tourism Plan in 2024.
- The government has published its Environmental Improvement Plan for 2023-2028, including actions such as completing the England Coast Path, which includes developing paths in Sussex between East Head and Shoreham-by-Sea as well as Eastbourne to Camber.
- The Jet Zero Council (a partnership between the Government, the aviation industry and academia) will continue to test, develop and implement solutions to achieve net zero aviation by 2050.

Objective 5: To ensure the tourism industry provides an accessible and inclusive offer that is open to all

- The Government's focus is on developing existing best practice approaches and toolkits such as the National Accessible Scheme (NAS), as well as research to discover how people's access to tourism is currently limited by their protected characteristics.
- The government will explore opportunities to increase the number of employers in the hospitality, leisure and tourism sectors signed up to Disability Confident.
- Investment in infrastructure that supports increased accessibility and inclusion will remain a priority, including the £30 million Changing Places Fund to increase provision of Changing Places toilets in public buildings such as hotels; delivering the Inclusive Transport Strategy; and conducting an accessibility audit of all railway stations across Great Britain

Objective 6: To make the UK a leading European nation for hosting business events

- The Government will continue to enhance the Ministerial Advocacy Programme, including increasing Ministerial attendance at business events and letters of support for event bids. It will also evaluate case for expanding the VisitBritain Business Events Growth Programme.
- A strategy for sustainable business events will be produced in line with broader Sustainable Tourism Plan and work with industry will continue to ensure the business events sector is fit for the future by identifying gaps in capacity and skills and potential improvements to accessibility.

The Tourism Recovery Plan is the government's strategic framework for supporting and working with the tourism sector and will continue to revisit the six objectives at regular intervals to ensure that the right policy interventions are in place to support the sector.

VisitBritain/VisitEngland Strategy

Even before COVID-19 hit, the **VisitBritain/VisitEngland** strategy was predicated on increased dispersal of tourism benefits to the countries and regions, alongside overall growth and increased productivity. The Visit Britain/Visit England Strategy (2020-2025) sets out how it will support the delivery of the Tourism Sector Deal, which will be achieved by:

Growing value

Through stepping up our domestic marketing activity, we will address the balance of trade deficit and encourage more people to holiday at home. We will focus on younger customers (aged 18-34), whose domestic tourism activity is in decline, and families, who are both essential for the long-term growth of *the industry. Through developing our customer segments for the domestic market, we will ensure we reach the right customers with the right content. Through our work in the delivery of the Tourism Sector Deal, we will support Government's ambition to make the UK the most accessible destination in Europe.*

Driving the dispersal of tourism value across Britain
Working in partnership with Destination Management Organisations (DMOs), we will grow visits and value of our leisure and business travel across England. This will be supported by the development of regional product that addresses domestic and international market gaps and address product gaps through the distribution platform Tourism Exchange Great Britain (TXGB). In addition, we will build our partnerships and expertise in route development to grow connectivity to regional England. Through our work on the delivery of the Tourism Sector Deal we will identify new Tourism Zones, supported by central Government, and a biddable funding process, to drive visitor numbers across the country, extend the season and to tackle local barriers to tourism growth.

Supporting productivity optimisation
Our priority will be to support the development of the England product, this will extend the season for an international and domestic audience and enable the distribution of this product in international markets building on the success of the Discover England Fund. By helping the industry build digital skills, we will ensure that product is researchable and bookable online. Our focus on winning business events for England will see us work closely with venues and locations and matching them with international opportunities, providing them with platforms to meet international buyers and supporting them through the bidding process.

Being the expert body on growing tourism
We will ensure that VisitEngland is seen as a trusted partner in delivering on the Government agenda and provide and distribute statutory research, data and analysis that informs our own, industry and Government decision-making. Supporting and working together with DMOs and the wider England industry our assets, market plans and intelligence will be shared for national benefit. We will also provide platforms and events that enable us to share best practice and celebrate business excellence across English tourism.

Our customers

Our global segments, nuanced by markets, are:

- Experience Seekers – younger, free-spirited and spontaneous, they like holidays full of action and excitement
- Explorers – older, they enjoy the outdoors, sightseeing and embracing local culture at a more relaxed pace
- Culture-Buffs – image and brand-conscious, travel is seen as a status symbol; they like well-known safe destinations
- Free and Easy Mini-Breakers – similar to Experience Seekers, this younger domestic audience love the opportunity to take short breaks where they can either let loose or unwind

Our markets

UK Domestic

Drive regional and seasonal dispersal increasing volume and value of short breaks in the shoulder season. Increase focus from one to two target audiences to address long term growth and short-term opportunity.

Overseas

Our most beneficial overseas market by some distance, and the market showing the most profitable growth, is the USA, followed by value growth from China. These are two of our markets that we uplift investment in using the GREAT funds – we add to that Australia, France, Germany, GCC, India and UK. Our secondary markets for value include the rest of Europe, Canada, Brazil and South Korea. Lower growth (among our core markets) is projected from Hong Kong, Japan, Russia and Austria. For each market we have developed and refined a market strategy that focuses on the best prospects for driving tourism growth.

A New Destination Structure in England - the Local Visitor Economy Partnership (LVEP) Programme

The de Bois Review of England's DMOs recommended the creation of a more efficient and effective model for supporting tourism at a regional level in England to maximise the potential of the visitor economy. In response, DCMS tasked VisitEngland to lead, develop and administer the LVEP programme as part of England's new destination structure. This new structure is shown in the following table.

Body	Role & Responsibilities
DCMS & VisitBritain/VisitEngland	▶ Set government policy, national strategy & priorities
Destination Development Partnerships (DDP)* c.15-20 across England	▶ Set regional priorities in line with national strategy & government policy ▶ Receive government funding to support strategic outcomes regionally & achieve impact via a joined-up approach ▶ Likely to be a partnership of LVEPs across a geography
Local Visitor Economy Partnerships (LVEP) c.40 across England	▶ Accredited by VisitEngland & represent a county or city region ▶ Lead, manage & market the destination ▶ Work in partnership with local Destination Organisations, local authorities & businesses ▶ Represent the destination at national level & work with VisitEngland on an agreed growth plan
Destination Organisations	▶ Non-accredited ▶ Operate below county or city region level & work closely with their LVEP ▶ Provide local products, services and infrastructure to support delivery of positive visitor experiences ▶ Support management and marketing of local destinations & maintain close contact with tourism businesses

Applications for LVEP accreditation opened in early 2023 and are continuing on a rolling basis.

*The DDP model is being piloted in the North East of England to prove the concept and the impact the model can have on growing the visitor economy. If the pilot is successful, the Government will consider setting up (and possibly funding) 15-20s DDPs across England.

UKEVENTS (formerly Business Visits & Events Partnership)

In November 2022 the Business Visits & Events Partnership (BVEP) re-branded as UKEVENTS to 'better reflect the diverse nature of the events sector which has grown to not only include meetings, conferences, exhibitions, and trade shows, but also incentive travel, event hospitality, ceremonies, sporting, cultural, outdoor and festivals'.

The re-brand follows the organisation's launch of 'The UK Events Report' in early 2020 to showcase how it will deliver the Government's Industrial Strategy. It illustrates the impact the UK events industry has on the economy - in 2019 business events generated more than £31bn of direct spend, with leisure events contributing a further £39bn. The report suggests that there is an opportunity to use both markets to showcase the UK's abilities and resources, bring communities together and support post-Brexit and post-pandemic growth.

Moreover, recent research from the UK Conferencing & Meetings Survey (UKCAMS) suggests a strong recovery for the UK meetings sector. In 2022, there were 1.02m conferences and meetings in the UK, generating £16.3bn of direct spend compared with 0.2m events and £4.9bn of spend in 2020. 2022 spend levels are equivalent to 93% of 2019 levels. Recovery in the domestic market has proved to be particularly strong with more than 80% of venues saying that enquiries are the same or higher than 2019 levels. Capital investment by venues is also encouraging with more than 70% of those surveyed investing in facilities and new product development. However, the international market remains significantly below the pre-Covid peak with only a quarter of venues saying enquiries are the same or higher than 2019.

National Coastal Tourism Academy (NCTA)

The NCTA's Vision Strategy and Action Plan (2017) was produced in collaboration with coastal tourism businesses and destinations to "help develop tourism on the coast in a holistic and collaborative way, giving coastal tourism a new stronger voice and creating a positive change in perception". It has four main objectives:

- Improving the Visitor Economy to support wider sustainable growth
- Develop a quality experience, distinctive activities and places to visit
- Greater working together
- Presenting a positive image of the coast

The objectives in the strategy are backed up by an action plan to be delivered by a working group comprising industry leaders, business owners and tourism experts.

In April the NCTA reported the latest findings from its Coastal Tourism Business Survey (Spring 2023). 2022 turnover was reported as better for 43% but worse for 22% of businesses. Business confidence also presented a mixed picture with 49% of businesses saying they were 'very/somewhat confident' and 29% reporting they were 'not confident'. Furthermore, 69% of businesses said they had had to increase prices and 29% say they closing on certain days or changing opening hours in order to save costs. The poor economic climate and rising costs were the biggest external factors affecting businesses.

REGIONAL CONTEXT

The Regional context is undergoing transition. Government confirmed in August 2023 the transfer of Local Enterprise Partnership (LEP) core functions to combined and upper tier local authorities from 1st April 2024, and that there will be no further public funding to LEPs from this time. Government has set out the core functions as:

- Embedding a strong, independent, and diverse local business voice into local democratic institutions.
- Strategic economic planning in partnership with local leaders that clearly articulates their area's economic priorities and sectoral strengths, including building and maintaining robust local evidence base
- Continuing to deliver functions on behalf of government departments, shaped by the local business voice where relevant. This includes the delivery of Growth Hubs on behalf of the Department for Business and Trade, and Careers Hubs on behalf of the Department for Education.

This change has implications for the Coast to Capital LEP and the South East LEP which covered the Sussex geography, and for the role of the local authorities in Sussex.

Sussex Chamber of Commerce Local Skills Improvement Plan

The Sussex Chamber of Commerce was chosen by the Department for Education as one of eight Local Skills Improvement Plan (LSIPs) trailblazer Chambers across the country in 2021. It recently refreshed its LSIP for Sussex, publishing a draft report in May 2023 which is currently awaiting approval by the Secretary of State for Education (expected in summer 2023). The report outlines five priorities for change:

- One: Support employers in Sussex to recruit, retain and upskill their workforce
- Two: Ensure a joined-up approach to meeting the skills needs in Sussex as identified by local businesses
- Three: Build a profile for and raise awareness of key sectors in Sussex (including the visitor economy)
- Four: Ensuring training and employment in Sussex is open and accessible to all
- Five: Speak with one voice in Sussex to influence national and local policy using an evidence-based approach

Skills East Sussex (SES)

Skills East Sussex (SES) is the multi-agency skills board for East Sussex, bringing together a partnership of key providers (DWP, Universities, Colleges, Independent Training providers, Schools, VCSE, businesses, Local Authorities) to set common priorities and address local employment and skills needs. In operation since 2014, it is supported by sector specific business led working groups (engineering, creative and digital, construction, land-based, health and social care, visitor economy and cultural venues) and thematic working groups (Net Zero, Adult Learning Network, Apprenticeships East Sussex).

Facilitated by the ESCC Employment and Skills Team, SES delivers projects (Careers Hub (supporting schools with careers guidance), Multiply (numeracy for adults), Transform (apprenticeship funding for SMEs), ESTAR (skills for marginalised adults), Moving on Up (employment scheme for the homeless), Help for Ukraine – employment scheme for Ukrainian guests and other refugee groups) and creating resources such as www.careerseastsussex.co.uk.

SES has identified six key priorities that all partners are working to support up until 2030:

- One: Ensuring that national policy and funding supports the delivery of learning and skills in East Sussex
- Two: Enabling our Further Education (FE)/Higher Education (HE) establishments to recruit excellent educators with specialist technical knowledge
- Three: Improving our digital skills and digital inclusion
- Four: Upskilling our workforce to increase regional productivity
- Five: Supporting the unemployed and unqualified
- Six: Skills for a Net Zero future

Gatwick

Gatwick is currently developing plans to bring its existing Northern Runway into regular use alongside the Main Runway. Regular use of the Northern Runway is planned to reduce delays, bring new global connections and enable passenger growth – serving up to 75 million passengers a year by 2038. Investment in the North Runways is estimated to generate 18,400 extra jobs and £1.5 billion for the local area and region by 2038.

Gatwick is also exploring the opportunities presented by Airport Economic Zones in order to attract inward investment, extend the profile and reach of Gatwick as a transport hub and grow high skilled jobs within the local economy.

Gateway Gatwick

Run by Gatwick airport this website positions Gatwick as a gateway to ‘a host of attractions across the South East of England.’ It gives a series of itineraries of things to do in 3 hours, 6 hours and 12 hours. It links to Experience West Sussex, East Sussex County Council, VisitBrighton and South Downs National Park as well as Visit Surrey, Surrey Hills and West Kent Partnership.

The South Downs National Park Authority (SDNPA)

The South Downs current Local plan (2014 – 2033) is the first Local Plan to plan for the National Park as a single entity. It sets out the National Park-wide policies in three main chapters:

- A Thriving Living Landscape
- People Connected to Places
- Towards a Sustainable Future

Tourism straddles chapters two and three with its ambitions manifested in the NPA Sustainable Tourism Strategy (2015-2020) which, although technically now out of date, is the most relevant document in helping to understand the National Park's approach to tourism. It was developed in association with a number of partner organisations and establishes seven core objectives:

- Objective One – to improve the visitor experience, develop a strong sense of local identity and ensure good quality design and sensitive development
- Objective Two – to diversify the tourism offer of the National Park, providing sustainable income for tourism service providers, diversifying services and extending the tourism season
- Objective Three – to share the social and economic benefits of tourism across the entire National Park, ensuring that the scale of tourism to be serviced at sites reflects the sensitivities of the landscape
- Objective Four – to encourage and support sustainability best practice in the tourism sector in working with delivery partners
- Objective Five – to encourage change in travel behaviour of visitors accessing the National Park
- Objective Six – to encourage a greater sense of custodianship of the National Park by visitors and improve the experience of tourism for residents
- Objective Seven – to raise visitor spend to levels that contribute more widely to the economy of the National Park

And four main delivery priorities:

- Area-based – identifying the opportunities available to meet the above objectives within each of the individual cities, towns and villages within SDNP
- Business Development – including product and skills development and fundraising support
- Sustainable Travel – including the development of cycle hire facilities, 'walkers welcome' initiatives and integrated travel packages
- Knowledge and Custodianship – including promotion of a sense of place toolkit and support for educational projects around the Biosphere status

The strategy concludes with four visitor-facing themes used to engage the public in experiencing the National Park. They are:

- Adventure Land – exploring and being active in the great outdoors, discovering the wider National Park and taking part in new activities
- Culture Land – celebrating the vast contribution of the Park to English culture through literature, art, folklore, music, and key historical characters
- Natural Land – celebrating the natural beauty and wildlife of the National Park and educating visitors on why this landscape is a special place
- Working Land – focusing on the busy working landscape of the South Downs through farming practices, local food & drink experiences and the sharing of traditional rural skills and crafts

The Sustainable Tourism Strategy is supported by strategic policy 'SD23: Sustainable Tourism' of the Local Plan. SD23 states that proposals for visitor accommodation, attractions, recreational activities, environmental education and interpretation should provide opportunities for visitors to increase their awareness, enjoyment, and understanding of the National Park. They should also foster guardianship of the special qualities, for example, by promoting and incorporating the National Park's natural beauty, wildlife, cultural heritage, and the ecosystem services the National Park provides. Proposals will be supported which reflect the four themes as set out in the SDNPA's Sustainable Tourism Strategy and future updates. It will seek to retain visitor accommodation and support a year-round visitor economy.

The South Downs National Park Partnership Management Plan sets out the most recent policies in relation to tourism, specifically under 'Objective 10 – Great Places to Work'. Within this there are two specific outcomes:

- To increase awareness and desirability of the South Downs as a special place to visit.
    - Supported by a wide variety of holiday accommodation, we want visitors to delve deeper and connect with wildlife, history, culture and cuisine. The Authority and its partners will therefore work together and create unique experiences for visitors which also benefit our communities and businesses.
    - Local awareness of the National Park has grown steadily – in 2018 82% of respondents noted that they were aware of being inside it, compared to 77% of people surveyed in 2011. But the National Park still has a low national and international profile and we intend to change this.
    - Research has shown that once people are aware of the sensitivity of their surroundings they are more likely to take action and care for the place.
    - Working with tourism partners and local providers, the Authority's Communications & Engagement Strategy aims to take visitors on a journey from awareness to becoming an active champion for the National Park.
- To establish the South Downs as an exemplar in sustainable tourism.
    - The South Downs attracted an estimated 18.8million visits in 2016, the highest of any UK National Park. However, at £342 million, the attributed visitor spend was one of the lowest per head, though it still supported approximately 4,900 full time equivalents. This is because the majority are day visitors, either living or staying in the surrounding area.
    - The visitor economy also differs across the National Park: in 2018 only 6% of total visitors surveyed were using accommodation inside the National Park, showing the potential for growth in provision elsewhere. Growth in international visits will help increase the economic impact of tourism to the South Downs and support employment opportunities by increasing demand and visitor spend.
    - Tourism brings economic benefits but can also put pressure on popular 'hotspots'. Businesses can reduce negative impacts by enabling visitors to have outstanding experiences out of season and accessible by public transport.
    - A combination of partners including tourism businesses and operators, the Authority, other UK National Park Authorities, Visit England and Visit Britain and local destination partners, will develop new projects which support a resilient sustainable tourism economy in the National Park, in line with the South Downs Local Plan and the Authority's Sustainable Tourism Strategy.

Brighton & Lewes Downs UNESCO World Biosphere Region – The Living Coast

A designated urban biosphere reserve, the Living Coast is an incredibly biodiverse area which stretches between Newhaven and Shoreham-by-Sea in Sussex. Alongside the urban area of Brighton & Hove, it includes a marine conservation zone and 14 Sites of Special Scientific Interest, two of which are national nature reserves.

Sussex Bay

The Sussex Bay initiative focuses on the restoration of Sussex marine and coastal habitats, with pathfinder projects in restoration of the West Sussex kelp beds, and coastal saltmarsh and wetland. The Sussex Bay project can support the development of unique eco-tourism experiences.

Tourism South East

Tourism South East is a not-for-profit organisation supporting the performance and growth of tourism businesses and destinations across South East England including Sussex, Kent, Surrey and Hampshire, amongst others. It originated as one of the former Regional Tourist Boards, was then supported by the Regional Development Agency (RDA) before becoming a member led tourism services organisation on the abolition of the RDAs. TSE supports its destination partners, be they local authorities or destination management or marketing organisations, through added value services, including PR support, Research and Marketing Campaigns. It hosts the consumer-facing website visitsoutheastengland.com, the official tourist website for South East England. Destination partners in Sussex are:

- Mid Sussex District Council
- VisitBrighton
- 1066 Country
- Discover Worthing
- Visit Eastbourne
- Sussex by the Sea
- Experience West Sussex

England's Creative Coast

Led by Turner Contemporary and Visit Kent, and in collaboration with organisations like Towner Eastbourne, the De La Warr Pavilion in Bexhill-on-Sea, and Hastings Contemporary, England's Creative Coast was the world's first art geotour. It showcased seven new art commissions by seven international contemporary artists connecting the coastlines of Kent, Essex and Sussex and the world class arts organisations in these places.

The project was principally funded by Arts Council England's Cultural Destinations programme and Visit England / Visit Britain through the Discover England Fund, supported by South East Local Enterprise Partnership (SELEP), East Sussex County Council, Kent County Council, Essex County Council, Visit Essex, Southend Borough Council, Experience West Sussex, Historic Dockyard Chatham and Southeastern and is also in partnership with Pallant House Gallery, Cass Sculpture Foundation and Arundel Castle.

LOCAL CONTEXT

The Sussex Visitor Economy Initiative (SVEI)

The SVEI was established in September 2020 by East Sussex County Council, West Sussex County Council and Brighton & Hove City Council, initially in response to the pandemic. The strategic partnership is working with public and private sector partners to harness the opportunities that cross-county collaboration brings to supporting sector recovery, resilience and growth, and to raising the profile of Sussex as a national and international visitor destination.

A vision and medium-term actions prepared for the SVEI in 2021 identified a £2.5bn growth target by 2030. The prize from achieving this growth would mean an additional 35,000 jobs and national recognition for Sussex as a leader in sustainable tourism. The vision for Sussex tourism is articulated below:

> *By 2030 Sussex will have built a **year-round sustainable visitor economy** as big as Wales. A place that puts the **wellbeing** of people and the **environment** at the heart of everything it does, where locals nurture what makes it special and proudly share those qualities with visitors.*
>
> *It will attract more **higher value discerning international and domestic visitors** looking for a short break as well as organisers of **business events, meetings and conferences**.*

The £2.5bn can be achieved by increasing the value from existing visitors as well as attracting more of the higher value visitors who bring the greatest benefits. This is illustrated in the table:

	2019 Value	2030 Value	Estimated Impact (not factoring inflation)	Notes
Overseas Visitors				
Increase number of overseas visitors by 33%	1.5m	2.0m	+£275m	Assume trip spend remains constant
Increase spend per night to £88 (England average £98)	£55	£88	+£650m	Assume static average length of stay and trips have increased to 2m
UK Staying Visitors				
Increase average length of stay to England average	2.57	2.98	+£475m	Assume maintain spend per night
Increase number of domestic staying trips by 1/3	5.5m	7.33m	+£400m	Assume spend/trip remains constant
Day Visitors				
Increase spend per day to £33.50 (England average £37.09)	£31	£33.50	+£200m	Assume no overall increase in number of day visitors
TOTAL			**+£2,000m**	**Equivalent to £2,500m after multipliers**

By focusing on higher value visitors and increasing the value from existing visitors, this increase in impact will result in a sustainable 3.7% uplift in annual visits from 62.4m to 67.4m over the 10-year timeframe.

The 2021 work recognised that delivery of the 2030 vision and £2.5bn growth target would require collaboration at county level with public and private sector players working in partnership. Consequently, a number of strategic pan-Sussex activities were identified to bring partners together and deliver a collective response. These medium-term action areas are outlined below:

Market Focus & Positioning

- Identify markets and visitor segments (including UK and international, business and leisure) with the strongest growth potential for Sussex.
- Distil the Sussex positioning to achieve cut-through and make an emotional connection with visitors.

Experience Development

- Work in partnership to develop 'joined-up' experiences which make the most of assets across the county and which can start to shift what Sussex is known for. These experiences include active outdoors, events, food and drink.

Destination Management

- There are a range of common management opportunities and challenges that destinations within Sussex should tackle together. Collaboration will result in more traction in each of these areas which include accommodation development and management of the supply of short term lets, improved sustainability, accessibility and tackling the skills and labour market challenges. It also includes improved research and insights to monitor performance and understand visitors and innovation in applying digital technologies.

In Spring 2022, the SVEI identified four initial priority areas for delivery in support of the medium-term actions outlined above. It published a progress update against its these initial priorities in March 2023:

Priority	Achievements to date
Define the key market segments Sussex should target	▶ International Segmentation for Sussex • Identified short and long-haul target markets and visitor segments with the greatest potential to deliver high-value visitors to Sussex. Project delivered in June 2022 with UK Community Renewal Funding (UKCRF) via a partnership led by Sussex Modern.
Create a bold and ambitious Sussex Visitor Story proposition and brand position	▶ Sussex Wine Tourism • An ambitious vision for Sussex wine tourism to secure Sussex's place as the UK's leading wine destination with a global reputation. The Prospectus for growth was delivered in June 2023 and sets out the steps to develop the county's wine tourism offer which will see the sector growth from £25m to £168m by 2040.

	▶ Sussex Visitor Story • An aspirational, ambitious and bold Sussex proposition and brand positioning will be the foundation for future campaigns to establish Sussex as a globally recognised destination. Initial outputs expected in July 2023. ▶ Escape the Everyday • £100k secured via 'Escape the Everyday' Recovery Marketing Fund towards digital marketing of bookable product in May/June 2022. Campaign generated 20m impressions, 90,000 page views and an uplift of 156% in products sold. ▶ Taking Sussex to the World • US booster campaign in partnership with Gatwick Airport via Expedia to promote travel and bookings to Sussex in 2023, delivering a return of approximately 9:1 on advertising spend.
Establish the Sussex meeting, incentive and conference proposition	▶ VisitEngland sales mission • 'Meet Sussex' attendance at Paris and Brussels trade shows in Q1 2023 to showcase the Sussex MICE proposition to international buyers ▶ European Meeting and Events Conference (EMEC) in Brighton • In March 2023 Meet Sussex co-hosted the European Meeting and Events Conference for Meeting Professionals International attracting 300 meeting planners, with the IMEX Group. ▶ Sussex Incentives • A familiarisation trip in partnership with Spectra DMC, a leading UK Destination Management Company, (March 2023) and development of a Sussex incentives brochure.
Advocate for Sussex within the sector and with national bodies	▶ Local Visitor Economy Partnership (LVEP) accreditation • Ongoing discussions with VisitBritain/VisitEngland in support of Sussex's application for pan-county LVEP accreditation.

	▶ Gatwick Airport Economic Summit, November 2022 • SVEI representation in panel discussions on partner collaboration to promote Sussex and grow the international inbound market and the opportunities offered by wine tourism.

Brighton & Hove City Council (BHCC)

In July 2023, BHCC approved its new Council Plan 2023 to 2027 'A better Brighton & Hove for all'. The plan includes a new vision for Brighton & Hove 'to be a city to be proud of, a healthy, fair and inclusive city where everyone thrives'. The vision is underpinned by four priority outcomes:

- One: A city to be proud of – with a flourishing economy and a sustainable, clean environment
- Two: A fair and inclusive city – with homes for all, work to reduce inequality, challenge discrimination, improve accessibility and keep people safe
- Three: A city where people can thrive – securing a better future for children and young people, and enable people to live healthy and fulfilling lives
- Four: A city of responsive and well-run council services – putting the needs of residents, businesses and visitors at the heart of what we do

The plan recognises the importance of the local visitor economy, with visitor numbers cited as a key indicator of success for priority one. Within this priority the plan outlines BHCC's desire to support the growth plans of small to medium-sized businesses, encourage partnership working to deliver a low carbon economy and create jobs, and attract inward investment to fund regeneration. The visitor economy can be both a driver of and beneficiary of activity to make Brighton and Hove 'a city to be proud of'. The visitor economy will also play a prominent role in the council's plans to 'promote and protect what makes Brighton and Hove unique' by demonstrating the city's distinctiveness as a visitor destination and host to major events, as well as a place of unique culture and heritage.

In order to deliver priority three, the council has outlined its plans to 'increase the take-up of apprenticeships… [and] collaborate with education institutions and businesses to plan for future skills needs'. Activity here will be relevant to addressing vacancies as skills gaps within the visitor economy.

The Visitor Economy Strategy (2018-2023) seeks to support wider city objectives to ensure tourism continues to deliver for Brighton & Hove and its businesses. It aligns with the cultural framework for Brighton and is being delivered alongside the Brighton & Hove Economic Strategy and Action Plan and the Greater Brighton Inward Investment & Export Strategy.

The focus of the VES is on growing higher spend overnight leisure and business trips and extending the length of stay, specifically 5% annual growth in value of conferences from a baseline of £53m and 3% annual growth in bednights and overnight visitor spend per annum – achieved through attracting more higher spending visitors and extending the length of trip.

On the leisure side, Brighton is taking a proactive approach to establish its role as city in the region by:

- Initiating areas for joint working with regional partners on tourism bids and programmes to achieve more funding into market intelligence, research and product development.
- Working with regional partners on cross-destination work including on growing international tourism, tourism packaging, market intelligence, e.g. big data, bespoke research on particular markets and visitor behaviour.
- Representing the city and region on tourism and working with national partners on the big tourism issues that are relevant to Brighton & Hove including on Brexit, skills and training – to ensure the city has a strong voice among decisionmakers and that the specific needs and opportunities of tourism for Brighton & Hove and the region are represented on a national stage.

On the conferencing side, the main focus is on association conferences, capitalising on the proximity of international gateways including Heathrow and Gatwick to attract events aligned with the intellectual capital of the region.

East Sussex County Council (ESCC)

The ESCC Council Plan for 2022/23 has four priority outcomes:

- One: Driving sustainable economic growth
- Two: Keeping vulnerable people safe

- Three: Helping people help themselves
- Four: Making best use of resources for now and the future

As part of driving sustainable growth, the plan outlines the ambition to 'create a pan-Sussex visitor economy group to re-start the leisure, hospitality, culture, retail and tourism economy and enhance existing marketing vehicles' with an intended outcome by 2025 to 'grow the visitor economy by raising the visibility of Sussex, enhancing perceptions, increasing the number of visitors to the coast, increasing length of stay and spend'. The plan will also 'create a prioritised list of cultural projects ready for and seeking funding over the value of £100k' which by 2025 is intended to 'create the conditions to ensure that East Sussex benefits from one of the fastest growing sectors of the economy, growing the creative economy by fostering creative start-ups, upscaling creative businesses and attracting businesses into East Sussex'.

ESCC is currently in the process of developing its Fourth Local Transport Plan (LTP4), which will be valid from 2023-2050. The draft strategy is currently under development and will be reviewed following the release of updated guidance from the Government's Local Transport Plan. It is hoped that the guidance will be released in the early Autumn, enabling a consultation period to commence in 2023. The strategic review and consultation will provide an opportunity to identify implications for the visitor economy.

Wealden District Council (WDC)

WDC's Economic Development Strategy 2023 – 2033 lists five key priorities, of which priority four is 'Visitor Economy & Culture'. This strategic priority recognises the benefits of partnership working across local authority boundaries to develop both Wealden's and Sussex's wider visitor economy.

Hastings Borough Council (HBC)

HBC has published an update to its Corporate Plan 2023-2024. A key objective of the plan is 'making the best use of land, buildings, public realm and cultural assets'. As part of this, HBC has launched a new Culture Strategy 2023-2028. The new strategy acknowledges the benefits of cultural tourism and outlines the opportunities for partnership working to deliver consistent messaging about the Hastings offer, supporting the development of transport infrastructure and regeneration projects and leveraging digital platforms to promote the area to wide audiences.

It should be noted that as part of the 2023 budget setting, HBC reduced the tourism budget and withdrew from contributing towards the costs of running 1066 Country, the public private partnership which supports tourism across Hastings, Rother and Wealden.

Rother District Council (RDC)

The development of Rother's economy is a key element of RDC's Corporate Plan 2020-2027. The visitor economy is viewed as playing an important role in the district's economic recovery with invest in 15 sustainable tourism events across Bexhill, Battle and Rye by the end of 2023.

Eastbourne & Lewes Councils

There are no published plans for tourism in Eastbourne or Lewes although there has been major investment in the Devonshire Quarter in Eastbourne supporting major events. A new local plan for Eastbourne is currently in preparation. The plan is currently subject to public consultation with the aim of being adopted by the end of 2024 and will look ahead to 2039.

West Sussex County Council (WSCC)

Our Council Plan is the West Sussex County Council Corporate Plan for 2021-2025. It sets out the priorities for the council over the next four years and the outcomes it wants to achieve for people who live and work in West Sussex.

It focuses on four priorities, all of which are underpinned by a cross-cutting theme of tackling climate change:

- One: Keeping people safe from vulnerable situations
- Two: A sustainable and prosperous economy
- Three: Helping people and communities to fulfil their potential
- Four: Making the best use of resources

Priority Two is supported by the Economy Plan 2020-2024, an update to the West Sussex Economic Growth Plan 2018-2023. The latest Economy Plan articulates how WSCC will work with partners to 'protect and revive tourism and the visitor economy' as one of nine priority themes to support the post-pandemic recovery of the West Sussex economy. WSCC's approach is underpinned by activity in three key areas:

- Host and partner in Experience West Sussex with the Districts and Boroughs to support the recovery and growth of the visitor economy in the county
- Progress a pan-Sussex approach to sector recovery and growth to ensure the area is positioned to benefit from national and regional opportunities and funding
- Increase engagement with the tourism community, to ensure they have a strong voice in plans and activities

A series of supporting headline actions for 2023-24 have been identified. All are predicated on effective partnership working:

- Work through the Experience West Sussex (EWS) Partnership to support the recovery and growth of the visitor economy sector through working to achieve the agreed key results for marketing, business support, product development, and insight.
- Work with Gatwick Airport and regional partners through the Gateway Gatwick partnership on international visitor promotion to boost visitor numbers and spend to the county.
- Lead the Sussex Visitor Economy Initiative (SVEI) with East Sussex County Council and Brighton & Hove City Council to achieve agreed priorities for the year with partners and the industry group, including the development of the Sussex Story and associated assets, the strengthened position for the Sussex MICE (meetings, incentives, conferences, and events) market, and the launch of the Sussex Wine Tourism Growth Plan including as part of a Parliamentary reception to mark Sussex Day.
- Work through the SVEI to advocate for Sussex with DCMS and Visit Britain / Visit England. Seek nationally awarded 'Local Visitor Economy Partnership' accreditation covering Sussex and use this to shape the direction of the Sussex approach and arrangements post Experience West Sussex funding in March 2024.

New research to inform WSCC's plans to support the visitor economy post-March 2024 has highlighted four priority areas to consider. As well as informing WSCC's potential future approach, these priorities would also resonate with the likely strategic interventions of a Sussex LVEP:

- Skills, recruitment and retention
- Boosting productivity growth, investment and innovation
- Enhancing natural capital and transitioning to net Zero
- Better digital and transport connectivity within the county and into wider region

In addition to the Economy Plan, WSCC published the West Sussex Transport Plan 2022-2036 with five thematic strategies:

- One: Active Travel Strategy
- Two: Shared Transport Strategy
- Three: Rail Strategy
- Four: Access to Gatwick Airport Strategy
- Five: Road Network Strategy

The Active Travel Strategy focuses on extending and improving the network of active travel facilities across West Sussex, including working with partners to deliver skills training and promotion initiatives – opportunities which may benefit visitor economy businesses given the post-Covid trend for increased outdoors activity from visitors across all demographics. The Access to Gatwick Airport Strategy is designed to support initiatives that will increase sustainable transport options for both passengers and employees, while ensuring that community needs are also considered.

Adur & Worthing Councils (AWC)

AWC is currently working to its five-year economic plan (2018-2023) which is looking to grow the visitor economy through the development and increased awareness of the cultural offer within the districts. They recognise that the visitor economy has scope for expansion by:

- Working with partners to broaden the accommodation offer

- Promoting underplayed attractions better
- Maximising opportunities for active tourism
- Developing evening and night-time economies
- Capitalising on proximity to SDNP and to Greater London and air and sea gateways
-

Arun District Council (ADC)

In 2020, ADC commissioned a strategic tourism review which made the following recommendations for the future delivery of tourism services by the council:

- Strategic Tourism Investment Role – to secure investment in the district (accommodation, events, attractions) and operationally to 'show the way' in lifting the quality of the visitor experience (public realm, signage, beach management) and advocate for visitors across the public and private sector
- A shared narrative – to develop thematic and town-based narratives for all to use
- Commission marketing support – to invest in the Experience West Sussex project to deliver regional campaigns that attract new visitors and work hard to get our fair share of that business. And invest in the information and marketing services in each of Arundel, Littlehampton and Bognor Regis
- A Refreshed Visitor Strategy – to prepare a new plan setting out clearly what ADC wants to achieve as a destination and bring focus and clarity to the actions that are needed

Following the tourism review, ADC has streamlined the Sussex by the Sea website and entered into service level agreements with local destination marketing partners including Love Bognor Regis, Visit Arundel and Visit Littlehampton. A new Visitor Strategy and shared destination narrative were commissioned in 2023 and are expected to be published before the end of the year.

Chichester District Council (CDC)

CDC, via Destination Management Organisation The Great Sussex Way, is working to a four-year destination management plan (2019-2023) with an overarching aim to position Chichester as 'a first-class year round destination; showcasing the natural beauty of the countryside & coast, while celebrating the quality of the heritage and cultural experience of the city, towns and events.' Its core objectives are to:

- Increase day visitor spend and dwell time
- Convert day visits into overnight stays
- Attract visitors from a wider catchment area (e.g. targeting visitors from South West London for both day visit and overnights and engaging the Travel Trade)
- Deliver a strong and distinctive brand
- Increase visitors outside peak season
- Work in partnership to create a healthy visitor economy

Crawley Borough Council (CBC)

Little is published around tourism by Crawley Borough Council. However, its 'One Town' Economic Recovery Plan 2022-2037 was approved in November 2021 and details five strategic priorities:

- One: A diverse and resilient economy – renew Crawley as an attractive, abundant, diverse economic powerhouse, founded on green growth and digital innovation
- Two: Green transformation – establish Crawley at the forefront of green growth and as a place where green technology businesses thrive
- Three: Town centre renewal – secure a vibrant neighbourhood and sustainable economic future for the town centre via significant qualitative investment
- Four: Skills for the future – to significantly improve overall social mobility among Crawley residents, creating powerful and effective skills pathways
- Five: Connected Crawley – to enhance a green economic future for Crawley by delivering low carbon transport and hyper digital connectivity

Between 2021 and 2026, almost £23 million will be invested in Crawley's town centre, including work to secure investment in a new Cultural Quarter in Crawley.

Horsham District Council (HDC)

HDC's visitor economy strategy (2018-2023) remains active and has three main pillars:

- One: Hub and host – to increase visitation, duration and spend and being the base for a visit to the wider aeras, promoting valued neighbours such as SDNB, Gatwick airport, the AONBs and coastal towns
- Two: Roots and shoots – business support, events delivery and experience development e.g. walking and cycling trails that include wildlife discovery and local produce
- Three: Curious nature – to celebrate local crafts, skills and to promote stories around local geology, landscape and wildlife

Mid Sussex District Council (MSDC)

In April 2022 MSDC approved a new Sustainable Economy Strategy and Action Plan 2022-2035. The strategy focuses on three key themes of:

- One: People – including protecting and creating better employment (particularly in emerging green economies); developing skills and improving pathways to work
- Two: Place – including reducing the council's carbon emissions; supporting businesses to reduce emissions; developing digital infrastructure; creating quality town and village centres
- Three: Partnerships – based on the council's guiding principles of openness, trust, honesty and mutual respect to deliver shared goals. Working in partnership with Experience West Sussex is cited as a key lever for supporting the recovery and grow of the local visitor economy

Greater Brighton Economic Board (GBEB)

Formed in 2014 from the Government's City Deal, the Greater Brighton Economic Board (GBEB) comprises seven local authority areas (Brighton & Hove, Crawley, Adur, Arun, Lewes, Mid-Sussex and Worthing) alongside Gatwick Airport, the National Park, educations providers and business partnerships. The Board is all about 'packing more punch' than the individual areas could achieve on their own with investment in infrastructure, major projects and homes. The main priorities that the GBEB has include:

- International – building profile to secure foreign direct investment
- Creative – helping creative business to scale up and grow
- Connected – as a technological hub
- Talented – using culture and natural assets to attract the best talent as well as developing grass-roots talent locally
- Resilient – balanced economic, social and environmental policies

Sussex Careers Hubs and Growth Hubs

An East Sussex Careers Hub has been in place for some time, and a new West Sussex, Brighton and Hove Careers Hub launched on 1 September 2023 providing opportunities for workforce and skills priorities. Similarly, there are likely to be Growth Hubs covering the geography of the Sussex plan and LVEP which should provide opportunities around supporting business.

Sussex Destination Management Organisations (as listed by VisitEngland)

Visit 1066 Country – a public and private sector partnership, bringing together Rother District Council, Wealden District Council, Hastings Borough Council, Tourism South East, National Trust and English Heritage. It covers 378 square miles incorporating the towns and villages of Battle, Bexhill, Bodiam, Camber, Hastings, Herstmonceux, Pevensey, Rye and Winchelsea. 1066 Country promotes the region as a high-quality, all-year-round destination to both day and staying visitors, prioritising families, cultural explorers and the iGeneration. As of April 2023, Hastings Borough Council has withdrawn funding for 1066 Country as part of its 2023/24 budget.

Visit Eastbourne – the official tourism website for Eastbourne run by Eastbourne Borough Council.

Experience West Sussex – the central voice for tourism in the region. Working in collaboration with partners West Sussex County Council and Adur District Council, Arun District Council, Chichester District Council, Crawley Borough Council, Horsham District Council, Mid Sussex District Council, Worthing Borough Council and the Coastal West Sussex Partnership, EWS delivers collective value through industry intelligence, leadership, information, inspiration and collaboration for the benefit of the West Sussex visitor economy. The partnership provides business support and creative marketing campaigns to attract visitors to the area and works with stakeholders including the LEP, SDNPA, Sussex Chamber of Commerce, Gatwick Airport, GTR and neighbouring destination management organisations to maximise results.

VisitBrighton – the official tourism organisation for the city of Brighton and Hove and part of the Tourism & Leisure unit within Brighton & Hove City Council.

Brilliant Brighton – a largely retail-led BID for the city of Brighton and Hove.

Sussex by the Sea – the official tourism brand of Arun District Council covering Arundel, Bognor Regis, Littlehampton and the villages of the Arun District in West Sussex.

The Great Sussex Way –DMO for the Chichester region, originally Visit Chichester, founded in 2004 and funded by Chichester District Council, now re-branded as The Great Sussex Way

Tourism South East – see 'regional' section above.

Other Sussex Marketing Organisations

- **Discover Worthing** – a joint Adur & Worthing tourism website run by Worthing Borough Council
- **Discover Horsham District** – a tourism website run by Horsham District Council
- **Visit Crawley** – a tourism website run by Crawley Borough Council (new website coming soon)

- **Experience Mid Sussex** – a tourism website run by a group of attractions, hotels and venues and sponsored by Mid Sussex District Council
- **Sussex Modern** – a celebration of the county's contribution to modern culture, inviting visitors to curate their own visit. Supported by SDNP, ESCC, Experience West Sussex, Locate East Sussex and philanthropy
- **Explore Wealden** – managed by Wealden District Council with a remit to showcase the diversity and quality of the local visitor offer

Collectively the resources of these different organisations are investing millions of pounds in tourism management, development and marketing across Sussex. Investment which is already reaping significant rewards for their local areas.

3 VISITOR DATA

KEY POINTS

- Nationally, both domestic and international inbound tourism have been growing since the removal of pandemic lockdown restrictions. Data for tourism days visits show that both visitor volume and value grew by almost half in 2022 versus the comparable period in 2021. And while international visits have been recovering at a slower pace, largely due to prolonged travel restrictions in China, VisitBritain has recently upgraded its 2023 inbound tourism forecast to reach 92% of 2019 visitor volume by the end of 2023 given a particularly strong performance from the USA and near European markets. Therefore, the growth conditions for Sussex with its mix of urban and rural, coast and countryside as well as proximity to London appear to be positive.
- Currently, only 2021 volume and value data is available for Brighton & Hove and West Sussex districts. This data shows that in 2021 tourism in Brighton & Hove attracted just under 10m visits (81% of 2019) and generated almost £875m of economic impact (67% of 2019). In 2021, West Sussex districts achieved 15.6m visits (63% of 2019) and £1.3bn in impact (63% of 2019). A notable recovery in day visits accounts for the relatively stronger volume performance of Brighton & Hove, whereas a higher proportion of overnight stays in West Sussex mean its value recovery is greater.
- As a result of changes in data collection methods for East Sussex districts, the latest available volume and value data is from 2019. However, for comparative purposes only, we have estimated 2021 volume and value numbers for East Sussex based on the relative change between 2019 and 2021 observed in West Sussex. On this basis, East Sussex districts could have generated somewhere in the region of £1bn in economic impact from an estimated 16m visits. When these figures are combined with Brighton & Hove and West Sussex numbers, this suggests Sussex overall could have achieved just under 42m visits and £3.3bn of economic impact in 2021. This would be the equal to 67% of 2019 volume and 65% of economic impact.
- Nevertheless, given that comprehensive volume and value data is currently only available for 2019, data from this year remains the most robust way to understand the size of the Sussex visitor economy when it attracted 62m visitors and generated more than £5bn in economic impact.
- Staying visitors were a very important market in 2019, accounting for 11% of all visits but 50% of spend. Overseas staying visitors were particularly important, accounting for just 2% of visits but 19% of spend.
- A relatively short length of stay by domestic overnight visitors was flagged as an issue in 2019, being below the England average at 2.5 nights in West Sussex and 2.7 nights in East Sussex, compared to 3 nights in England and 3.9 nights in Norfolk. The average length of stay by overseas visitors was

relatively high in East Sussex: 8 nights compared to 4.9 nights in West Sussex and 7 nights in England. The prevalence of language schools in East Sussex may have been contributing to this high length of stay.

TOURISM VOLUME & VALUE

Domestic tourism – the national picture

In April 2021 VisitBritain launched its new Great Britain Tourism Survey which combines two previously separate surveys for domestic day and overnight visits into a single study. While changes in data collection mean that new data is not directly comparable with 2019 and earlier periods, latest day visit data for 2021 and 2022 has recently been released and shows both volume and value growth year on year. Tourism day visits in England grew by 41% and associated spend by 47% over the comparable period between 2021 and 2022. Day visit volume and value in South East England grew at the same proportions as the national trend.

Table 1: England & SE England Domestic Day Visit Volume & Value Data

	Apr-Dec 2021 (m)	Apr-Dec 2022 (m)	% change	Full year 2022 (m)
England				
Day visit volume	545	772	41%	945
Day visit value	£21,188	£31,247	47%	£38,740
South East England				
Day visit volume	92	130	41%	162
Day visit value	£3,255	£4,785	47%	£5,863

Source: Great Britain Tourism Survey 2021 and 2022. Domestic overnight data from 2021 and 2022 is due for release in September 2023.

Inbound tourism – the national picture

VisitBritain has recently upgraded its 2023 inbound tourism forecast. The new forecast predicts inbound visitor volume will reach 37.5 million (92% of 2019 levels) by the end of 2023 and spend of £30.9 billion (90% of 2019 levels when adjusted for inflation). This buoyant performance is led by the USA, with France and Spain also performing strongly. While East Asian markets (including China) remain below pre-pandemic levels, the overall growth trend suggests that total inbound volume and value will return to 2019 levels by the end of 2024.

The Picture in Sussex

At the time of writing, the most up-to-date volume and value data currently available is from 2021 and for Brighton & Hove and West Sussex districts only. In 2021 Brighton & Hove attracted approximately 9.99 million visits, generating £875m in economic impact and supporting more than 13,000 FTE jobs. West Sussex districts achieved a total of 15.6 million tourism visits, resulting in more than £1.3 billion in economic impact and supporting just under 21,000 FTE jobs.

Day trips have rallied in Brighton & Hove in 2021, reaching 85% of 2019 volume and 81% of value. As an urban and coastal location, the city is likely to have performed well on day trips due to its transport connectivity and the opportunity for visitors to engage in a variety of activities including shopping. In comparison, West Sussex districts have seen a relatively stronger recovery on staying visits due to the rural and coastal profile of its destinations which enabled visitors to take advantage of self-catering accommodation for socially distanced breaks.

Table 2: Day and Staying Trip Volume and Value in Brighton & Hove and West Sussex, 2019 and 2021

	Brighton & Hove			West Sussex		
	2019 (m)	2021 (m)	% change	2019 (m)	2021 (m)	% change
Day trip volume	10.70	9.09	-15%	21.63	13.90	-36%
Day trip value	£400.00	£322.20	-19%	£723.34	£481.76	-33%
Staying trip volume	1.67	0.90	-46%	2.70	1.71	-37%
Staying trip value	£567.37	£302.93	-47%	£684.72	£404.48	-41%
Economic Impact	£1,303.22	£874.49	-33%	£2,114.23	£1,337.38	-37%
FTE Jobs	17.7k	13.4k	-26%	27.9k	20.7k	-30%

District Economic Impact Reports, 2019 and 2021. Please note data from District Economic Impact Reports is not directly comparable with data from the Great Britain Tourism Survey due to differences in data collection.

A change in data collection methodology in East Sussex districts means the delivery of volume and value analysis for 2021 has been delayed. Therefore, it is now anticipated that 2021 and 2022 results for East Sussex will be delivered in September 2023. 2022 data for Brighton & Hove and West Sussex is also expected to be available at around a similar time.

Consequently, in the absence of up-to-date data for East Sussex districts, it is difficult to accurately assess the volume, value and economic impact of tourism for this area of the county during a period in which pandemic restrictions began to ease. Nevertheless, by taking the average decline in tourism volume and value experienced between 2019 and 2021 in West Sussex and applying these results to East Sussex numbers for 2019, we have attempted to extrapolate estimated results for 2021. This analysis is for illustrative purposes only in the interim and does not supersede data which will published in forthcoming economic impact reports.

Extrapolated results for East Sussex suggest somewhere in the region of 16.3m visits to its districts in 2021, delivering £1.17 billion in economic impact and supporting approximately 19,900 FTE jobs.

Combining 2021 numbers across all three 'upper tier' areas of Sussex on this basis results in an estimated 41.9m visits, an economic impact of £3.4 billion from tourism and a sector supporting just under 54,000 FTE jobs.

Table 3: Sussex Tourism Volume, Value & FTE Jobs 2019 vs 2021

	Brighton & Hove			West Sussex			East Sussex*		
	2019 (m)	2021 (m)	% change	2019 (m)	2021 (m)	% change	2019 (m)	2021 (m)	% change
Trip volume (total visits)	12.37	9.99	-21%	24.34	15.61	-36%	25.47	16.27	-36%*
Economic impact	£1,303.22	£874.49	-33%	£2,114.23	£1,337.38	-37%	£1,860.14	£1,171.89	-37%*
FTE Jobs	17.7k	13.4k	-26%	27.9k	20.7k	-30%	28.4k	19.9k	-30%*

*Source: 2019 Economic Impact Reports for all Sussex Districts; 2021 Economic Impact Reports for Brighton & Hove and West Sussex only; *2021 East Sussex numbers estimated by applying average 2019 to 2021 declines experienced in West Sussex to data for East Sussex from 2019. Analysis for illustrative purposes only.*

Table 4: Pan-Sussex Tourism Volume, Value & FTE Jobs 2019 vs 2021

	Total Sussex		
	2019 (m)	2021* (m)	% change
Trip volume (total visits)	62.46	41.86	-33%
Economic impact	£5,198	£3,331	-35%
FTE Jobs	74,009	53,961	-27%

*Source: As above. *East Sussex numbers are estimated only.*

Until 2022 data is available across all districts to create a comprehensive picture of the tourism sector in Sussex, we recommend using 2019 data as the most robust data set for assessing volume and value of tourism within the county. Therefore, we have included below a summary of the key 2019 figures from the original version of this baseline report produced in 2021.

TOURISM VOLUME & VALUE 2019

In 2019 Sussex attracted approximately 62 million tourism visits, generating over £5 billion[1] in economic impact for the local economy and supporting 74,000 full-time equivalent jobs. In context, this means Sussex's tourism economic impact was around ten times that of the Isle of Wight, close to two thirds that of Wales, over half that of Greater Manchester and a third that of Scotland. The staying visitor market accounted for 11% of total tourism trips and 50% of visitor spend. The overseas staying market accounts for just 2% of total tourism trips but close to a fifth (19%) of visitor spend.

[1] Economic impact includes an economic multiplier, i.e. the initial round of visitor expenditure (£3.9 billion) results in increased spending on supplies and services as well as increased spending by employees whose wages are supported by tourism spend.

Table 5: Sussex Tourism Volume & Value 2019

	Number of Trips (m)	Share of Trips	Number of Nights (m)	Share of Nights	Spend (£m)	Share of Spend
UK staying visits	5.5	9%	17.7	64%	£1,196	31%
Overseas staying visits	1.5	2%	9.9	36%	£731	19%
Total staying visits	7.0	11%	27.5	100%	£1,927	50%
Day visitors	55.4	89%	-	-	£1,949	50%
Total visitors	**62.4**		**27.5**		**£3,877**	

Table 6: Sussex Tourism Economic Impact 2019

	Visitor Spend (£m)	Economic Impact (£m)	Employment supported (fte)
Total visitors	**£3,877**	**£5,198**	**74,009**

Source: District Economic Impact reports, 2019

Notes: (i) Economic Impact reports use the Cambridge Model which is based on the three national surveys: GB Tourism Survey, GB Day Visits Survey and the International Passenger Survey. Because of low sample sizes at a local level, 3-year averages are used. Therefore 2019 figures are an average of 2017, 2018 and 2019. (ii) Sussex figures have been derived by summing all district reports. This may result in a small amount of double counting, i.e. one visit to Sussex could involve a visit to two districts; this would be counted in the above totals as two visits rather than one. The impact of such eventualities is likely to be small and has been ignored.

As shown in the table below, at approximately £31.00 per day in 2019 in both East and West Sussex, spend by day visitors was below the England average (£37.09), although higher than in Norfolk (£27.07) and Suffolk (£27.90)[2].

[2] GB Day Visits Survey (3-year averages 2017-2019), Visit Britain

Table 7: Day Visits: Average Spend

	Day Visits	
	Volume of trips (m)	Ave spend per day
Brighton	11.7	£39.72
East Sussex (inc. Brighton)	29.5	£31.25
West Sussex	21.1	£31.00
Norfolk	36.9	£27.07
Suffolk	25.0	£27.90
England	1,442	£37.09

Sources: GB Day Visits Survey (3-year averages 2017-2019), Visit Britain

While spend per night for UK staying visitors was close to the England average and higher than in Norfolk and Suffolk, relatively shorter average lengths of stay meant overall spend per trip was lower. For the overseas market, the high length of stay in East Sussex (8 nights) resulted in a greater average spend per trip compared to West Sussex, Norfolk and Suffolk, although being still well below the England average (which includes London).

Table 8: Staying Visits: Average Spend and Length of Stay 2019

	UK Staying Visits				Overseas Staying Visits			
	Volume of trips (000)	Ave spend per trip	Ave spend per night	Ave length of stay (nights)	Volume of trips (000)	Ave spend per trip	Ave spend per night	Ave length of stay (nights)
East Sussex (inc. Brighton)	2,360	£180.23	£67.19	2.68	925	£410.04	£51.27	8.00
West Sussex	1,623	£158.38	£64.33	2.46	561	£290.54	£59.08	4.92
Norfolk	2,955	£221.23	£57.05	3.88	205	£335.18	£46.51	7.21
Suffolk	1,406	£193.27	£54.56	3.54	146	£354.86	£42.82	8.29
England	99,030	£194.70	£65.32	2.98	36,114	£686.16	£98.19	6.99

Sources: GB Tourism Survey (3-year averages 2017-2019), International Passenger Survey 2019, Visit Britain

Pre-pandemic the overseas market was clearly an important one for Sussex in terms of volume and value. National survey data provides the following analysis, illustrating the importance of overseas visits and notably spend, compared to Norfolk and Suffolk. East Sussex in particular had a high proportion (close to half) of staying visitor spend generated by overseas visitors. (Note: Cambridge Model analysis results in lower, but still significant proportions for overseas visits and spend: 21% of visits and 38% of spend for Sussex as a whole.)

Table 9: The Overseas Market 2019

	Trips (000)			Spend (£m)		
	All Staying Visitors	Overseas visitors	Overseas as proportion of all staying trips	All Staying Visitors	Overseas visitors	Overseas as proportion of all staying spend
East Sussex (inc. Brighton)	3,285	925	28%	805	379	47%
West Sussex	2,184	561	26%	420	163	39%
Norfolk	3,160	205	6%	723	69	10%
Suffolk	1,552	146	9%	323	52	16%
England (including London	135,144	36,114	27%	44,061	24,780	56%

Sources: Great Britain Tourism Survey (2017-19 averages), International Passenger Survey 2019, Visit Britain

Language schools

The prevalence of language schools across East Sussex is likely to be contributing to the high proportion of overseas visitor spend. A 2020 report by Visit Britain[3], 'Inbound Visitors who take an English Language course', found that English language students stayed for three times longer than average visitors, spending over twice that of other travellers. English UK lists 22 language schools in Brighton & Hove, 5 in Eastbourne and 3 in Hastings. Economic impact reports for Sussex districts provide estimates of trip numbers for 'paying guests'. These are overseas visitors staying in private houses, primarily language students. Across Sussex as whole, 'paying guests' account for 10% of all overseas trips. In Brighton the proportion is 12%, Eastbourne 16% and Hastings 34%. Proportions are less than 5% for West Sussex districts apart from Adur & Worthing (20%).

[3] Inbound Visitors Who Take an English Language Course, Foresight - Issue 177, Visit Britain, September 2020

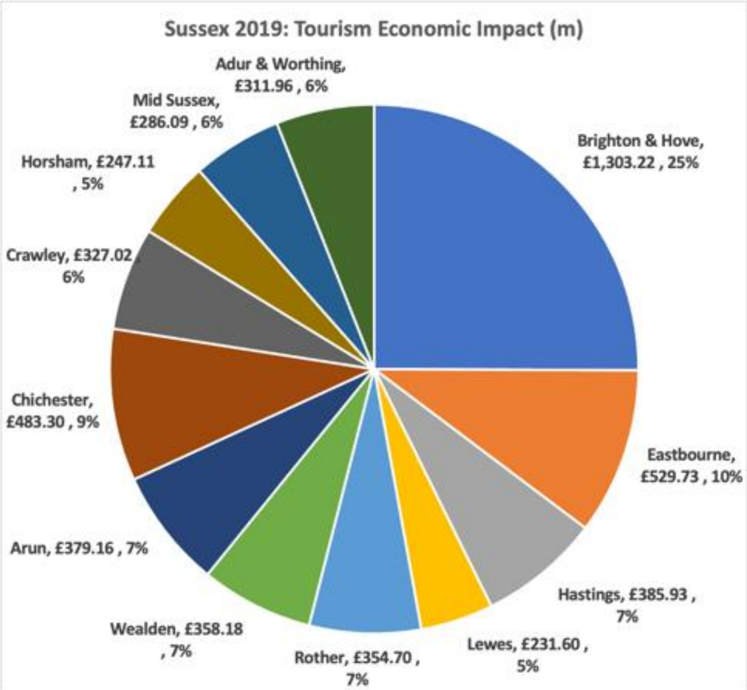
DISTRIBUTION OF VISITS AND IMPACT ACROSS SUSSEX 2019

The following table provides tourism volume, value and economic impact figures for each district (source: District Economic Impact reports, 2019). Rother, Eastbourne, Hastings, Chichester and Brighton & Hove all have a ratio of tourist trips to local resident population of more than 40:1. The chart below illustrates the distribution of tourism economic impact across Sussex. Brighton & Hove accounted for a quarter of the £5.2 billion of economic impact generated by tourists in Sussex. Eastbourne generated 10%, Chichester 9%.

Table 10: Sussex Tourism: Volume, Value & Economic Impact by District 2019

	Population (2019)	Staying Visits (m)	Day Visits (m)	Total Tourism Visits (m)	Tourism Visits per resident	Visitor Spend (£m)	Economic Impact (£m)	Employment (fte)
Brighton & Hove	290,900	1.67	10.70	12.37	43	£976.38	£1,303.22	17,700
Eastbourne	103,700	0.81	4.65	5.46	53	£408.89	£529.73	7,986
Hastings	92,700	0.52	3.83	4.35	47	£288.26	£385.93	5,240
Lewes	103,300	0.35	3.10	3.45	33	£190.50	£231.60	2,930
Rother	96,100	0.54	5.70	6.24	65	£296.86	£354.70	6,024
Wealden	161,500	0.47	5.50	5.97	37	£301.79	£358.18	6,219
Arun	160,800	0.65	3.75	4.40	27	£267.49	£379.16	5,208
Chichester	121,100	0.59	5.12	5.71	47	£333.91	£483.30	6,662
Crawley	112,400	0.47	2.02	2.49	22	£220.09	£327.02	4,526
Horsham	143,800	0.23	3.75	3.98	28	£170.43	£247.11	3,358
Mid Sussex	151,000	0.39	2.90	3.28	22	£205.01	£286.09	3,896
Adur & Worthing	174,900	0.38	4.38	4.76	27	£217.22	£311.96	4,260
Sussex	**1,712,200**	**7.0**	**55.4**	**62.4**	**36**	**£3,877**	**£5,198**	**74,009**

Source: District Economic Impact reports, 2019. Note: Totals may not tally due to rounding


Sussex 2019: Tourism Economic Impact (m)
Adur & Worthing, £311.96 , 6%
Mid Sussex, £286.09 , 6%
Horsham, £247.11 , 5%
Crawley, £327.02 6%
Chichester, £483.30 , 9%
Arun, £379.16 , 7%
Wealden, £358.18 , 7%
Rother, £354.70 , 7%
Lewes, £231.60 , 5%
Hastings, £385.93 , 7%
Eastbourne, £529.73 , 10%
Brighton & Hove, £1,303.22 , 25%

4 MARKET ANALYSIS

KEY POINTS

- Given the relative importance of overnight and international visitors in delivering value, growth markets have been identified among visitor segments perceived to have the best fit with the Sussex proposition. These visitors are more likely to stay longer and engage with the diversity of the county's offer. The USA and Germany followed by Canada, France and the Netherlands are priority international markets where Explorers looking for a gentle pace of life can be targeted via Sussex's heritage, landscapes, and food and drink offer. International Experience Seekers are also seen as a key target with Brighton as a potential gateway to the rest of the county and where these adventurous visitors can engage with action-packed outdoor activities, quality food and drink and quirky accommodation.
- Domestic segments Country-Loving Traditionalists have a comparable profile to Explorers, thus product development and marketing that resonates with the former should also attract the latter. Correspondingly, UK Free & Easy Mini-Breakers are most analogous with International Experience Seekers.
- The Sussex leisure offer and perceived quality of life were identified as key motivations for the business and meetings market.
- The majority of Sussex visitor surveys date back to before the pandemic and therefore may not be completely representative of the contemporary visitor base. Previous research identified older couples (55+) travelling without children and from ABC1 socio-economic groups as being the major current domestic market on the whole but with Bognor Regis and Littlehampton as exceptions given the higher proportion of families visiting. By contrast, Brighton was seen as having little to offer families, attracting Pre/Post or Never-Nesters travelling without children.
- The domestic market was also largely local and regional travelling from the South East (Kent, Surrey, Hampshire) and London but with Brighton attracting visitors from further afield across England. The majority of overseas visitors to Sussex were travelling from Germany, followed by Netherlands, France, USA, and to a lesser extent, Australia. Research by ESCC showed that 30% of overseas visitors were travelling into Dover from Calais and 28% were arriving at Gatwick Airport.
- Structural issues affecting the tourism market that existed pre-covid remain. While more people are now travelling globally the international travel market has become increasingly competitive. The UK from being the 6th most visited country in the world in 2016 to 10th in 2019. Therefore, the need to stand out and connect emotionally with visitors is ever more important. Within the UK, London is the dominant destination, so visitors also

need compelling reasons to look beyond the capital. UK labour shortages and a lack of private investment within the sector are also stymying recovery and growth potential.

- Nevertheless, UK tourism is predicted to grow over the next decade and could be worth up to 10% of the total UK economy if national and local policy remains supportive in the medium to long-term.
- In the short-term, the cost-of-living crisis is a serious issue for domestic travellers. People remain price sensitive and say they are looking for ways to save money on trips by eating out less and by looking for cheaper accommodation. However, there are signs that more people are beginning to think that the worst of the crisis has passed and currently more people are interested in taking a UK trip than they are abroad. Therefore, destinations have an opportunity to attract domestic visitors with a distinctive offer strong value proposition that justifies people's 'investment' in a UK break.
- Sussex's burgeoning wine tourism offer is an opportunity to tap into a number of growing consumer trends including sustainable travel, wellness and the pursuit of authenticity. More broadly, the county's mix of coastal and rural means it is well-positioned to appeal to growing trend for outdoor pursuits and people's increased interest in wellbeing. Catering to multi-generational groups also presents an opportunity given the range of the county's visitor offer and with implications for travellers who may have accessibility issues.

Notes: (i) Most of the market data available is at least 5 years old with ESCC dating back as far as 2009-2012. Dates are given for each of the source data used. (ii) There is more market data available in the East of the county (BHCC, ESCC, 1066 Country) than the West. Data in the West predominantly comes from CWS focusing on the coastal towns. There is a market data gap for inland West Sussex. (iii) Organisations use different segmentation models meaning there is no consistency in visitor profiles, existing or target. (iv) SDNPA market data covers destinations across the region and so there may be some double counting.

GROWTH MARKETS

Recent segmentation research[4] has highlighted target markets for Sussex among international audiences and UK domestic travellers. International priority markets are the USA and Germany with Canada, France and the Netherlands also having a good fit with the Sussex offer. These best prospect segments have been identified based on their likelihood to deliver value via longer overnight stays and engagement with a range of activities across the county.

UK	WHO THEY ARE AND WHAT THEY WANT	INTERNATIONAL	WHO THEY ARE AND WHAT THEY WANT
Country-Loving Traditionalists 	• Couples aged 50+ travelling without children • Mid-affluence living in South East England • Countryside breaks • Heritage, outdoors & experiencing local culture – including food & drink	**Explorers** 	• Typically 45+ travelling without children • Largest segment in Germany & Netherlands. Significant in France, Canada & USA • Mid-affluence; overseas trips a priority • Like a relaxed pace in small cities/countryside • Heritage, outdoors & experiencing local culture – including food & drink
Free & Easy Mini-Breakers 	• Under 35s travelling without children • Willing to spend on trips • City breaks • Trips packed with activities & experiences • Events, culture, boutique accommodation, quality food & drink • Public transport & good digital connectivity	**Experience Seekers** 	• Under 35s travelling without children • Largest segment in USA, Canada & France • Frequent travellers & will spend on experiences • Cities, plus rural locations that offer 'only here' experiences (e.g. active outdoors, events) • Boutique accommodation, quality food & drink • Public transport & good digital connectivity

[4] Blue Sail, 2022

UK	WHO THEY ARE AND WHAT THEY WANT	INTERNATIONAL	WHO THEY ARE AND WHAT THEY WANT
Business Tourism – UK & International 	• Non-discretionary business meetings • Association conferences • Incentive groups • Corporate meetings and events • A compelling offer of venues, accommodation options and leisure experiences		

Wellbeing, sustainability, accessibility and inclusion are emerging as post-pandemic drivers of global tourism. With its enviable combination of rural, coastal and heritage assets, plus a burgeoning reputation for local sustainable food and drink (including wine), Sussex is well placed to attract visitors looking for a destination that can support their wellbeing and encourage responsible tourism. From a destination management perspective, there is an opportunity for Sussex to reinforce its credentials around accessibility and inclusion and sustainability to strengthen the visitor offer. A strong reputation in these areas is also likely to support Sussex in securing potential funding for development activity where it can demonstrate leadership and best practice to other destinations, particularly as a member if the LVEP network.

The natural landscape and cultural offer of East and West Sussex are likely to resonate with mature target markets (UK: Country-Loving Traditionalists; International: Explorers). Whereas Brighton can be a gateway to the rest of the county for Gen Z and millennial travellers (UK: Free & East Mini-Breakers; International: Experience Seekers). Given its strong position in the MICE market, Brighton is also likely to be an attractor for business visitors who could also engage with the county’s broader leisure offer in the East and West as well as unlocking further potential in the conference and meetings market within venues across the county.

EXISTING MARKETS

Derived mainly from visitor surveys and historic segmentation studies, current markets for areas within Sussex are as follows:

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
SDNPA *Customer Segmentation and Market proposition 2018*	▶ 78% day visitors (89% local – from Surrey, Sussex or Hampshire) ▶ Half of staying visitors from a local or regional catchment (i.e. London and surrounding counties including Oxfordshire, Wiltshire and Essex) ▶ 5% from overseas – Germany, Netherlands, USA, Australia, France, predominantly staying in Sussex, Hampshire, London, Kent ▶ 60% frequent visitors (at least once every 6 months) ▶ Less than a fifth first time visitors (higher for staying)	▶ Almost 40% are visiting as a couple, increasing to almost 50% amongst staying visitors ▶ 28% families (more likely to be day visitors) ▶ Three quarters (75%) of visiting parties did not have children in them. This was higher among staying visitors (82%). ▶ Day visitors were relatively evenly spread across all age groups. Staying visitors were more likely to be from older age groups (55 years+)	▶ Walking (30%) – more popular with staying visitors than day visitors ▶ Visiting an attraction (20%) ▶ Fresh air / views (10%) ▶ Take the dog for walk (8%) ▶ Meet with friends and family (6%) ▶ Adventure and specialist interest activities (fishing, horse riding etc) accounted for less than 1% ▶ Cycling only a motivator for a small proportion of visitors but more popular amongst day visitors	▶ Older couples and parties without children form the majority of the domestic overnight market ▶ People visit primarily to enjoy walking and generally being outdoors together ▶ Families are more likely to be on day trips from home using the national park as a local outdoor playground, dog walking etc ▶ SDNP attracts a high number of repeat visits – established and loyal visitor base (but this will be skewed by those day visitors who use the

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
			▸ Ease of getting there also featured	national park for regular local exercise and activities.
East Sussex County Council *East Sussex Data Warehouse - GBDVS, GBTS, IPS, Destination Survey (2009-2012), Mosaic groups*	▸ Approximately 40% are day visitors from home (Battle significantly lower 23%) – spread pretty evenly amongst socio-economic groups ▸ Nearly 40% are on a day trip from holiday accommodation (Battle much higher at 64%) ▸ 20% are overnight visitors (Eastbourne higher at 32%) with 83% living in Kent, London, Essex and Surrey ▸ 41% VFR ▸ 4% business travel ▸ 81% holidaymakers (some VFR) ▸ 56% staying in a seaside location ▸ 66% are staying 1-3 nights ▸ Overseas visitors – Germany (20%), France (10%), Netherlands (8%), USA (7%)	▸ Mosaic Profile A City Prosperity – high earners, city living, no children, 26-35 ▸ Mosaic Profile B Prestige Positions – significant disposable income, grown up children, 56-65 ▸ Mosaic Profile C - Country Living – well off homeowners, rurally-based, grown up children, 56-65 ▸ Mosaic Profile E - Senior Security – elderly singles and couples, 66+, no children ▸ Mosaic Profile G - Domestic Success – family with children, disposable income, 36-45	▸ Day visitor activities undertaken – eating and drinking (27%), walking (14%), general relaxing (10%), sightseeing on foot (7%), beach (5%) ▸ Staying visitor activities undertaken – walking (43%), general relaxing (40%), sightseeing on foot (27%), beach (24%), sightseeing by car 17%), visiting a garden (8%), visiting a historic house (7%)	▸ Local visitor base, even those staying overnight – 'holiday on the doorstep' ▸ Short breaks prevail (1-3 nights) ▸ Ferry most popular form of travel for overseas visitors ▸ Four of the five most represented segments have no children or grown up children

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
	▶ 30% of overseas visitors are travelling into Dover from Calais, 19% are arriving at Gatwick South (19%) – of those, 35% are VFR, 45% are holidaymakers and 10% are business tourists ▶ Nearly 30% are first time visitors	▶ 51% visiting as a couple ▶ 25% of domestic overnight visitors 65+		
Coastal West Sussex *Visit Survey Report 2016*	▶ Predominantly domestic market – 74% come from within the South East followed by London (6%) and East England (5%) ▶ On average across the area, 5% of visitors are from overseas (Arundel higher at 10%) – Germany, Australia, USA, France. ▶ Almost two thirds are on a day visit from home ▶ 11% are on a day trip from holiday accommodation ▶ 27% are overnight visitors (Selsey & Bognor overnight visitors higher at 78% and 51%)	▶ 41% are visiting in a family group ▶ 32% are visiting as a couple ▶ Two thirds of visitors are from ABC1 occupation grades (lower for Bognor and Littlehampton – 54%) ▶ 56% of visitors aged 55 or over ▶ One third of Coastal West Sussex visitors are retired ▶ Bognor and Littlehampton visitors are a little younger and more likely to be families	▶ Food and drink (58%), shopping (50%), just relaxing (35%), short walk (34%), visitor attraction (20%), attending an event (8%). ▶ Shopping much more popular in Chichester than all other destinations. Just relaxing much higher in Worthing than others. ▶ Most important influencers cited: 'Been before and want to	▶ Family groups are an important market for CWS – multigenerational perhaps given percentage of visitors over 55 ▶ There are huge differences in type of trip (and to some extent socio-economic grade) across the different destinations – difficult to find a consistent regional offer ▶ Loyal core market coming back – established appeal but could also be due to comfort and complacency.

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
	▶ 29% first time visitors to CWS		come back' (50%), presence of beach and water-based activities (41%), Family friendly activities (20%) – particularly important for Littlehampton and Bognor, Great for walking (16%) ▶ None of the destinations are rated very highly for 'vibrancy', with Littlehampton and Bognor seen as less vibrant than others. ▶ Overall trip enjoyment rated as high or very high by 79%	This is supported by the relatively high satisfaction rates even though it's not considered a particularly vibrant area
BHCC/ VisitBrighton	▶ Visitors most likely to come from the London area or the south east (41%) but also attracts a significantly higher proportion of visitors from the East Midlands	▶ Brighton attracts a younger audience than other destinations in GB with significantly more 18-24, 35-44 and 45-54	▶ Relatively low satisfaction scores which hinders repeat visits (though these had	▶ Visitors staying in Brighton are more likely to travel further than to other parts of Sussex. ▶ Appeals to younger visitors

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
Brighton Destination Report 2017 *Brighton Visitor Survey 2018*	when compared to Great Britain average. ▶ Receives a lot of day visitors (almost twice as many as Bournemouth, Cambridge and Southend) - day visitors tend to travel from the capital at weekends, in the summer months and for big festivals and events. ▶ Visitors significantly more likely to stay in a B&B	year olds and with older people less likely to visit.	improved in a 2018 study) ▶ Among domestic holiday makers Brighton is known for its unique, fun and entertaining offering of activities and shopping opportunities. ▶ Visitors recognise it as a fairly easy destination to get to which can provide an exciting and distinctive experience	▶ Perhaps doesn't live up to its reputation and so lower repeat visits
Hastings 1066 Country *Visitor Survey Final Report 2016*	▶ 22% on a day trip from home ▶ 33% on a day trip from holiday accommodation ▶ 45% staying overnight in 1066 Country (consistent throughout peak and off peak) – Battle and Rye most popular overnight destinations, particularly peak season ▶ 91% on leisure/holiday trip ▶ 7% VFR	▶ 58% visiting as a couple in peak season (drops slightly off peak) ▶ One third travelling in small family groups (drops to a fifth off peak) ▶ More families staying overnight ▶ 30% of all visitors over 65 ▶ 69% ABC1 (Rye higher, Hastings lower)	▶ Battle Abbey most popular visitor attraction (32%) ▶ Historic sites/heritage most important influencer followed by scenic environment, good places to eat and drink, plenty for adults to see and do, peace and quiet, architecture,	▶ Leisure/holiday trips dominate in 1066 country ▶ Sees more visiting couples than families but the latter are an important market as they are more likely to stay overnight ▶ High proportion of overseas visitors can be attributed to the English

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
	- 1% business - 33% first time visitors - 5% visiting as part of an organised group - 85% domestic visitors (54% of which come from the South East and 7% from Greater London area) - 15% overseas (1 fifth of overnight visitors) – Germany, Netherlands, USA, Australia, France		art and culture, base for walking/rambling - 98% of visitors ranked the enjoyment of their trip as high or very high	Language Schools in the Hastings area

MARKET TRENDS

The big picture context

In 2019 tourism in England generated £1.06 billion a year, supporting 2.6 million jobs and over 230,000 small to medium-sized enterprises[5]. However, Covid-19 caused severe disruption for the sector with tourism-direct Gross Value Added (GVA) declining by 64% in 2020 versus 2019[6]. International tourism ceased during 2020 due to travel restrictions for inbound travellers, with the full removal of those measures only possible in March 2022. Domestic tourism was also heavily impacted over lockdowns between 2020 and 2021 as businesses closed, events were called off and travel around the country was restricted.

While a £37 billion package of grants, tax relief and loans was granted to hospitality, leisure and tourism businesses to aid businesses and support post-pandemic recovery, some longstanding challenges facing the sector prior to Covid still remain and with businesses and households now facing additional pressure on as a result of rising prices:

- **An increasingly competitive global travel market** – while the overall size of the market increases as more tourists have the means to travel, the UK's market share has declined, falling from being the 6th most visited country in the world in 2016 to 10th in 2019.
- **London dominates the inbound visitor economy** – the capital accounted for 52% of all international overnight stays and 56% of international visitor spend in 2019.
- **Seasonality remains a barrier to productivity** – low visitor numbers outside of peak seasons impact staff retention and reduce economic productivity.
- **High labour shortages** – research shows 24% of businesses in 'Accommodation and Food Services' are suffering from worker shortages; twice the level of to the rest of the economy and leading to some businesses pausing trading or being unable to meet demand.
- **A lack of private investment** – high inflation is inhibiting business investment in the sector, slowing both recovery and growth.

[5] England Tourism Factsheet 2019, VisitEngland

[6] Tourism Recovery Plan Update on Delivery, March 2023, DCMS

Nevertheless, as we have seen, there are encouraging signs of growth in both domestic and international tourism for England and the UK as a whole. In fact, the World Travel and Tourism Council (WTTC) forecasts that an additional 70,000 jobs per year could be created in the UK's tourism sector over the next decade. A supportive policy environment, investment in infrastructure and jobs and skills will be necessary to capitalise on consumer trends and enable the sector to achieve its growth potential – being worth as much as £286 billion (equivalent to 10% of the total UK economy) by 2032[7].

Consumer sentiment

While the cost-of-living crisis remains a top-of-mind issue for people, VisitEngland's latest consumer research[8] (July 2023) suggests a lessening in the perceived severity of the situation. 50% of UK domestic travellers believe that 'the worst is still to come. However, this has fallen from 74% in July 2022; while the number of people saying that the 'worst has now passed' has almost doubled to 20% during the same period.

More UK travellers say they are most likely to take trips in the UK (36%) than most likely to take overseas trips (26%) with UK holidays seen as being easier to plan and cheaper than foreign holidays. While this is good news for the domestic market, data suggests people remain budget conscious as they are more likely to be looking for a short break rather than a longer holiday in the UK compared to a year ago and also hoping to reduce spend by eating out less, choosing cheaper accommodation and by finding free activities.

Consumer trends

In addition to the cost-of-living crisis which is likely to affect consumer sentiment and behaviour in the medium-term, other macro trends in global tourism should also be considered as these will influence travel patterns in the longer term:

- **Sustainable travel** - People are concerned by sustainable and responsible travel and how they travel to and around a destination, where the food and drink comes from and how service providers are managing scarce resources. With increasing consumer demand for sustainable travel options - from

---

[7] World Travel and Tourism Council (WTTC), May 2022
[8] Domestic Sentiment Tracker, VisitEngland and BVA BDRC, July 2023

younger travellers in particular - the global sustainable tourism market is anticipated to grow 23% year on year in the next decade, according to research from Future Market Insights.

- **Ageing population** - One of the most significant trends affecting destinations is the ageing population. As the Boomers mature, reach retirement, and have paid off their mortgages they are likely to remain one of the most significant travel markets for both domestic and international travel. Their interests are well documented, and they want to keep their body and mind stimulated and meet like-minded people. With 37%[9] of the European population (age 15+) over 55 accounting for 39% of all private travel there is plenty of evidence to support the value of this demographic.
- **Accessible travel** – People with health conditions and impairments, alongside their travelling companions, spend £15.3bn on trips in England each year. Therefore, as well as being a moral and legal duty, better accessibility offers enormous market potential and supports inclusivity.
- **Multi-generational travel** - Multi-generational groups, 'Grandtravel', and differently shaped, non-linear families are all increasingly prevalent. This was on the up before the pandemic, but 2020 highlighted the importance of sharing with family. Large group accommodation will be popular in the coming years. This is also an important consideration for group of friends wishing to get together and rent large, multi-unit accommodation where they can party and catch up on lost time together during the pandemic.
- **Outdoor activity** - One activity that grew significantly during the pandemic was cycling. According to the National Travel Attitudes Survey, as of January 2021 34% of cyclists were cycling more than they were before the pandemic, while 38% of walkers were walking more[10]. And the trend looks set to continue with 95% of those who are cycling more and 94% of those who are walking more planning to keep it up post pandemic.
- **Wellness** - Wellness is an increasingly large and mainstream aspect of global tourism believed to account for around 14%[11] of all tourism expenditure ($563bn) and faster growing at 14% (2013-2015) compared to all tourism growth of 6.9%. Wellness, in particular mental health, is more important than ever as people have become been acutely aware of these issues during lockdown resulting from working from home, isolation, loss of income etc. Visitors want to escape into nature and enjoy sensory experiences e.g. yoga retreats, long-distance walks, forest-bathing, wellness focused facilities such as wild river baths, open air hotels, outdoor spas, yoga, meditation, hiking and massage therapies.

---

[9] Tourism Trends and Ageing. Eurostats. 2016

[10] Department for Transport National Travel Attitudes Survey Jan 2021

[11] Global Wellness Institute

- **Experiential travel** - Visitors want to connect with a place and its people, making an authentic connection with a destination. For example, they might participate in a workshop, attend local festivals, or visit studios of local artisans. People are seeking local interactions and to support communities. Recent research[12] found an emotional link between people and places that is often difficult to verbalise, but which is tangible and affects people psychologically and physically. Importantly, people want to share their connection to a significant place with others. People are seeking experiences that combine fun /learning/self-improvement/well-being. They want local food, drink, crafts offered through independent businesses.
- **Maximising behaviour** - Visitors want to cram a lot into a short space of time, enjoying unique experiences across the day and into the evening. It is important that there is a range of quality experiences on offer that are sufficiently different from home. Inspiration and information about what there is to do, and how to access and book, is important. Alongside maximising behaviour, people want to minimise risk and unwelcome surprises by having a pre-planned itinerary. This 'maximising' is also related to people's increasing desire for experiential travel and the opportunity to immerse themselves in all that a destination has to offer.
- **'OOO' travel – the Workation** - Out of Office working – so many people are now not working from their traditional office setting during traditional office hours. People can continue to work from their holiday locations. Wi-Fi and connectivity is important for people so they can enjoy themselves whilst continuing to keep up to date at work.
- **Technology trends** - Social media continues to grow in prominence in travel marketing with the public driving content creation. Video is the new currency for storytelling, giving Destination Management Organisations the opportunity to utilise user-generated-content to make a connection with audiences and support marketing initiatives. People will also expect technology to help control health risks whilst on the move with features such as virtual check in, online reservations and touch free payments. Additionally, there is an expectation that technology will support online research and booking – both prior to and during a visit.

[12] Places That Make Us. National Trust. 2017

5 DESTINATION AUDIT

KEY POINTS

- The combination of striking coastal scenery, beautiful rural landscapes, historic towns and vibrant resorts provides a rich and varied offer for the Sussex visitor. The South Downs National Park covers a sizeable area, including much of West Sussex, covering an area of 1,625 km^2 from Winchester to Eastbourne. It includes the South Downs Way National Trail, Seven Sisters Country Park and the Sussex Heritage Coast, which incorporates the iconic chalk cliffs of Beachy Head and the Seven Sisters. The UNESCO Living Coast Biosphere is also a key feature of this landscape, symbolising the area's biodiversity and a catalyst for developing eco-tourism.
- The High Weald Area of Outstanding Natural Beauty (AONB) is a medieval landscape of wooded, rolling hills, stretching from Hastings to East Grinstead. Chichester Harbour AONB is both a striking natural landscape and a major wildlife haven. Historic towns such as Hastings, Battle, Rye and Arundel are a prominent feature of Sussex, with 1066 Country resonating amongst visitors worldwide.
- The sunny climate and chalk soil have helped to create award winning vineyards, with Sussex sparkling wine granted protected regional status by DEFRA. Brighton has established itself as an artistic, vibrant city with a nightlife buzz and impressive festival scene, whilst Eastbourne is recognised for its Victorian, seafront architecture, palm tree-lined promenade and iconic pier.
- There has been exponential growth in the number of short-term lets in Sussex since July 2021. Blue Sail research estimates than almost 5,000 additional lets have come onto the market across the county over the last two years – an increase of more than 80%.

This destination audit is not intended as a comprehensive assessment of all visitor attractions and products. Rather we have focussed on distinctive features that Sussex offers as a visitor destination. While similar activities/products will certainly be available in other destinations, by highlighting those that are uniquely Sussex or that stand out as part of the visitor offer, we can start to create a picture of the distinctive Sussex experience. These 'signature experiences', with their associated 'star' products are:

- Brighton – Brighton Pier, the Lanes, Brighton Pavilion, Brighton Beach, Brighton & Hove Albion Football Club
- Sussex coast – Beachy Head, Seven Sisters, Camber Sands, West Wittering Beach, Chichester Harbour

- Sussex countryside – South Downs National Park, Devil's Dyke
- Sussex historical towns – Hastings Old town, Battle, Rye, Lewes, Arundel, Chichester
- Sussex vineyards – Tinwood Estate Vineyard, Albourne Estate, Bolney Wine Estate, Rathfinny Wine Estate, Ridgeview
- Sussex gardens – Nymans, Wakehurst, Sheffield Park and Garden
- Heritage attractions – Arundel Castle, 1066 Battle Abbey and Battlefield, Petworth House, Fishbourne Roman Palace, Bluebell Railway
- Performing arts & festivals – Glyndebourne, Chichester Festival Theatre, Goodwood Revival, Goodwood Festival of Speed, Great Escape Festival, Brighton Festival & Fringe, Brighton Pride, Charleston, De La Warr Pavilion

Outdoor activities and food & drink are further notable features in Sussex with, for example, the South Downs Way, the Cuckoo Trail, National Cycle Network routes and a rich array of food & drink options available as part of the visitor offer.

.

Photos: Trip Advisor, National Parks UK, National Trails, Highweald.org, Visit England, UK Beach Guide, 1066 Country, Visit South East England, Visit Eastbourne, Sussex Express, brighton-pride.org, Battlesussex.co.uk, Visit South East England

STAR AND SIGNATURE EXPERIENCES

Based on our research and investigation into destination characteristics and visitor offer, we present eight signature experiences for Sussex, together with their leading or 'star' products. Star products have been selected using the following selection criteria:

- Attraction/site/place gets into top 20 lists from national/international sources
- Rates high in TripAdvisor and other similar platforms, relative to other similar places/sites/attractions either regionally or nationally.
- The product has a national/international status that sets it apart/is a marque of quality, e.g. World Heritage Site, National Park.
- It is part of a national network that gives it profile/positioning within certain markets, e.g. NT property
- The attraction/place/site has an international/national iconic status instantly recognisable from an image/its name
- It's a place of pilgrimage/must see/iconic within sizeable special interest markets
- It has a strong presence/following on Instagram/Twitter/Facebook

There are of course many more products and experiences than we have highlighted and there will be differences in opinion as to what should be included.

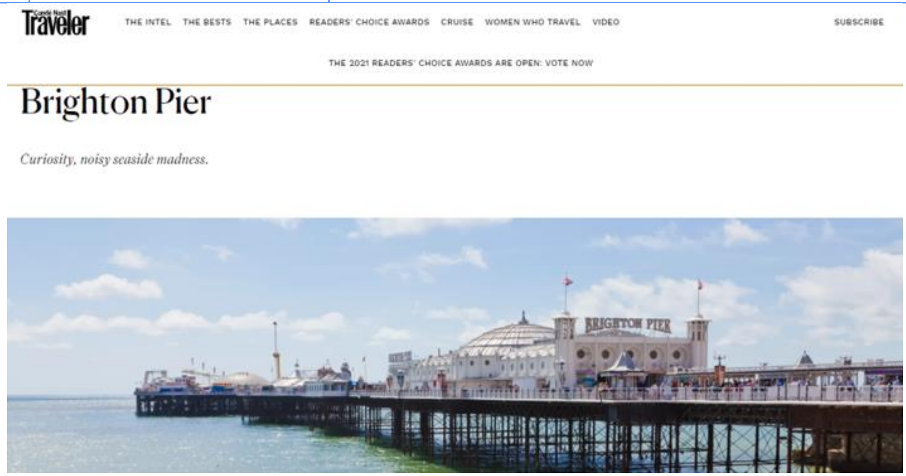
Table 10: Sussex Star Products

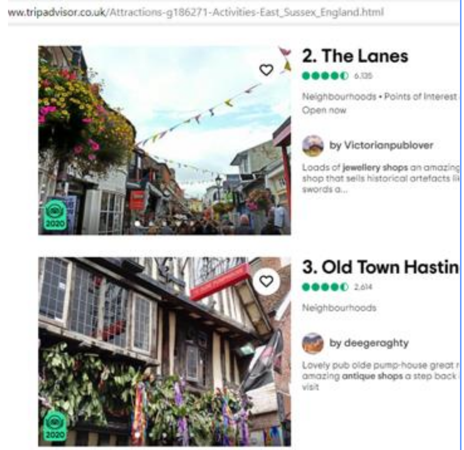
Signature Experience	Star Products	Location	Description	Meets Selection Criteria?
Brighton	Brighton Pier	Brighton	Grade II Listed pleasure pier. 4.6m visitors in 2022 (up 9% since 2021).	No. 2, Visit England's Most Visited Free Attractions in England; No.1, Visit England's Most Visited Free Attractions in South East Region.

	Royal Pavilion	Brighton	Grade I Listed. Built as a seaside pleasure palace for King George IV.	No.2, Trip Advisor's Top Attractions in East Sussex
	The Lanes	Brighton	Historic quarter with narrow, twisting lanes, independent shops, crafts, cafes, pubs, restaurants	No.3, Trip Advisor's Top Attractions in East Sussex
	Brighton Beach	Brighton	Brighton’s beach.	No.10, Trip Advisor's Top Attractions in East Sussex
	Brighton & Hove Albion FC	Brighton	Premier League football team of international renown; high-quality hospitality offer	American Express Community Stadium – No.2 Trip Advisor's Top Attractions in Brighton

TOP 10 MOST VISITED FREE ATTRACTIONS IN ENGLAND:

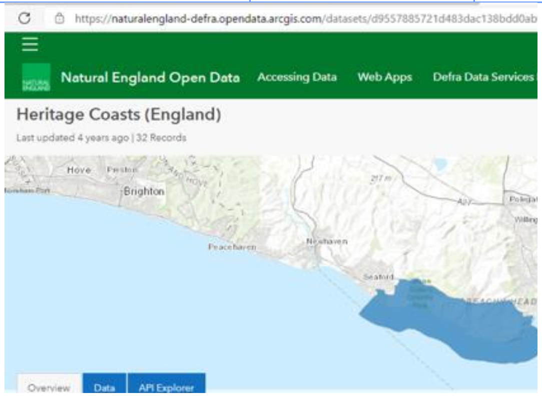
Rank	Name of Attraction	2019 Visitors	2020 Visitors	20
1	Natural History Museum	5,423,932	1,296,763	
2	Brighton Pier	4,901,221	4,110,005	
3	British Museum	6,239,983	1,275,466	
4	Tate Modern	6,098,340	1,431,704	
5	National Gallery	6,011,007	1,197,143	
6	Victoria and Albert Museum	3,992,198	872,750	
7	Somerset House	2,841,772	724,310	
8	Science Museum	3,301,975	861,795	
9	Abbey Gardens (Bury St Edmunds)	1,228,564	1,021,048	
10	British Library	1,534,860	334,070	



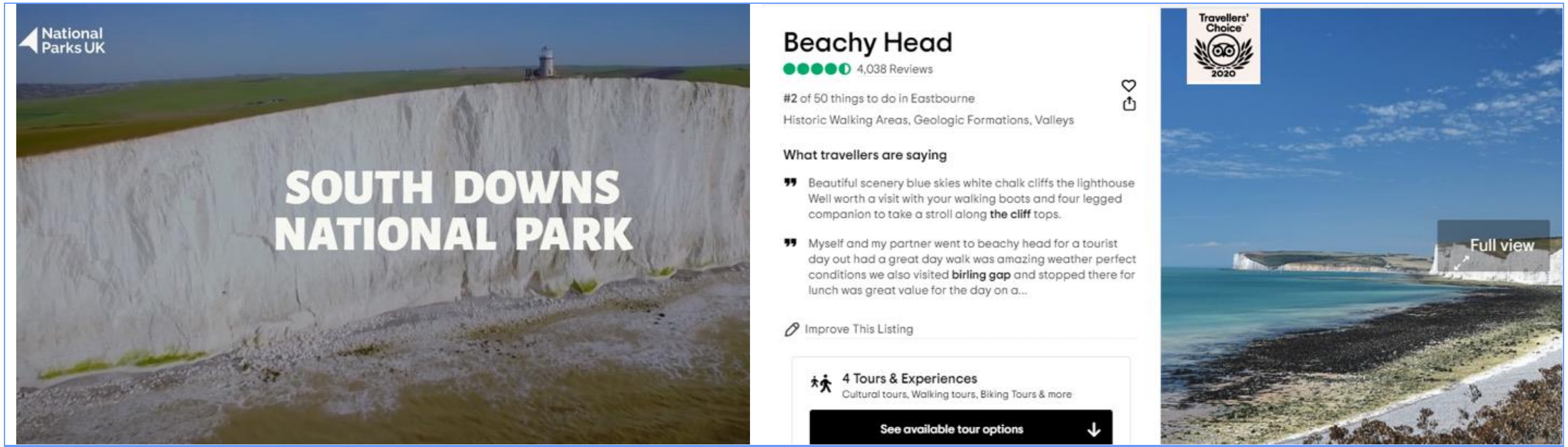


Sussex Coast	Beachy Head	Eastbourne	Highest chalk sea cliff in Britain. Famous beauty spot.	AONB; No.2, Trip Advisor's Top Attractions in East Sussex

	Seven Sisters	Seaford – Eastbourne	Stretch of coastline with dramatic chalk cliffs. On South Downs Way.	Heritage Coast designation (Natural England)
	Camber Sands	Camber, Rye	5 miles of sandy beach & dunes.	No.1 in Time Out's Best Beaches in the UK.
	West Wittering Beach	Chichester	Sandy beach at entrance to Chichester Harbour.	AONB; No. 15 in Time Out's Best Beaches in the UK.
	Chichester Harbour	Chichester	Harbour	AONB

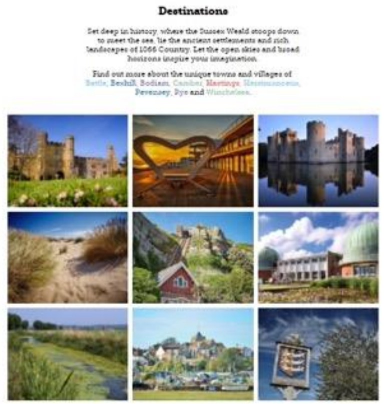


Sussex Countryside	South Downs National Park	South Downs	National Park covering 628 sq. miles across East Sussex, West Sussex and Hampshire. Includes the South Downs Way (national trail).	National Park
	Devil's Dyke	South Downs	V-shaped valley. Famous, National Trust beauty spot. Part of an SSSI.	National Trust; SSSI
	Knepp	Sussex Low Weald	3,500 acre rewilding project	Exemplar site for rewilding activity

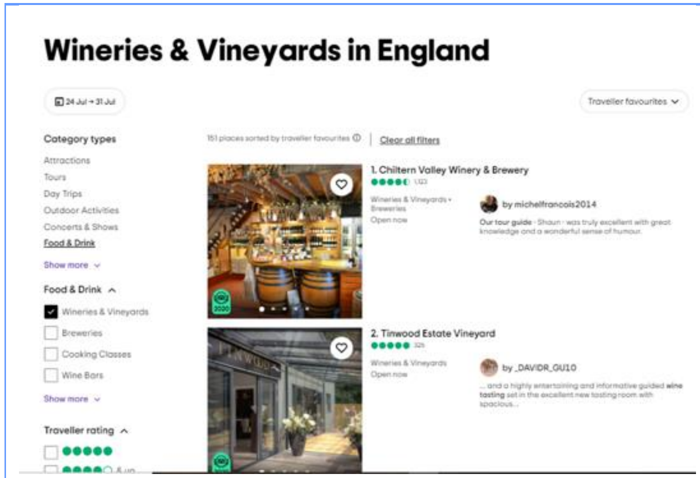


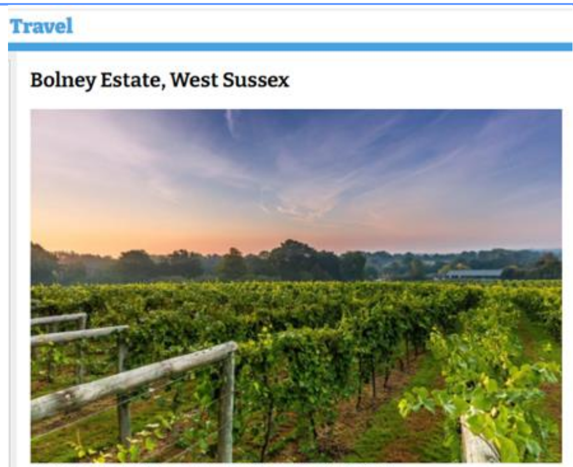
Sussex Historical Towns	Hastings Old Town	Hastings	Historic town. One of the medieval Cinque Ports.	No. 11, Trips Advisor's Top Attractions in East Sussex; Battle of Hastings internationally known.
	Battle	Battle	Historic town. Site of 1066 Battle of Hastings.	Battle of Hastings internationally known.
	Rye	Rye	Medieval citadel	Member of the Cinque Ports Confederation. 'One of the best preserved, walled medieval towns in England', Discover Britain's Towns.
	Lewes	Lewes	Market town with medieval streets and remains of a Norman castle.	Included as offers significant heritage profile.

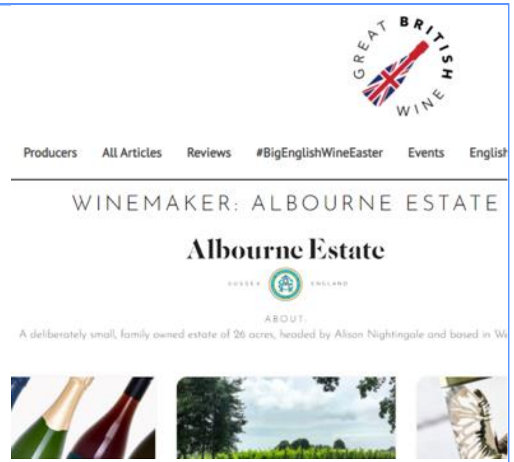
	Arundel	Arundel	Market town including landmarks of Arundel Castle and Arundel Cathedral.	Included as offers significant heritage profile.
	Chichester	Chichester	Georgian city including Chichester Cathedral and Chichester Harbour.	Included as offers significant heritage profile.



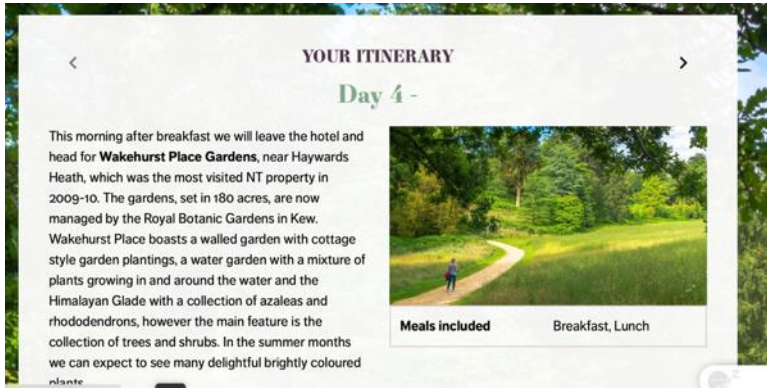
Sussex Vineyards	Tinwood Estate Vineyard	Chichester	Vineyard with tours, tasting room and 3 luxury lodges.	No. 6, Trip Advisor's Wineries and Vineyards in the UK.
	Bolney Wine Estate	Haywards Heath	Vineyard with shop, café, tours, tastings.	No. 14, Trip Advisor's Wineries and Vineyards in the UK.
	Rathfinny Wine Estate	Polegate	Vineyard with tours, tasting room & restaurant, trail, gift shop, heritage centre, barn accommodation with 10 rooms, conference facilities.	RIBA nominated winery. Will develop to become one of the largest single vineyards in England and one of the largest in Europe.





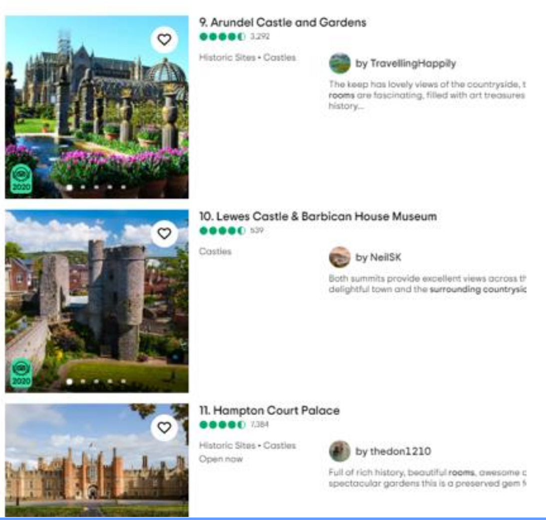


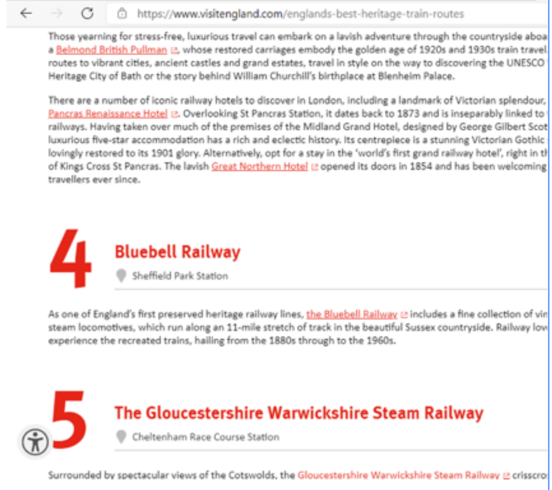
Sussex Gardens	Wakehurst	Ardingly, Haywards Heath	Elizabethan Mansion and wild botanic garden. Owned by National Trust, managed by Royal Botanic Gardens, Kew. C.300,000 visitors annually.	No. 7, Visit England's Most Visited Paid Attractions South East Region.
	Nymans	Handcross, Haywards Heath	National Trust Garden, Grade II Listed. C. 380,000 visitors annually.	No.8, Visit England's Most Visited Paid Attractions South East Region
	Sheffield Park and Garden	Uckfield, Wealden	National Trust historic parkland and garden. C.300,000 visitors annually.	No. 13, Visit England 's Most Visited Paid Attractions South East Region.



Heritage Attractions	Arundel Castle & Gardens	Arundel	Stately Home & fortified castle	No. 4, Trip Advisor's Top Castles in South East England.
	1066 Battle Abbey and Battlefield	Battle	Benedictine Abbey built on the site of the Battle of Hastings.	Battle of Hastings internationally known. English Heritage property.
	Petworth House and Park	Petworth	17th Century Grade 1 Listed Country House and 700-acre landscaped park.	Contains 'one of the finest art collections in the care of the National Trust.' Famous for Turner particularly.

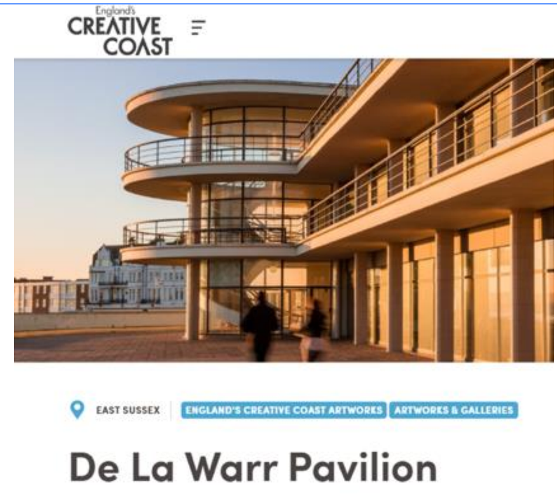
	Fishbourne Roman Palace	Fishbourne	Archaeological museum. First Century site and largest residential Roman building discovered in Britain.	No. 1, Trip Advisor's Top Attractions in West Sussex
	Bluebell Railway	Sheffield Park	Steam railway operating along 11-mile track.	No. 4, Visit England's 'England's best Heritage Routes'.





Performing Arts & Festivals	Glyndebourne	Lewes	Renowned Opera House and festival	Internationally known.
	Chichester Festival Theatre	Chichester	Producing festival theatre. Opened 1962, under first artistic director, Sir Laurence Olivier.	Flagship regional theatre with international reputation.
	Goodwood Revival	Goodwood	High end, historic race meeting event staged entirely in period dress.	Goodwood internationally known.

	Goodwood Festival of Speed	Goodwood	Motoring event of international reputation	Goodwood internationally known.
	Great Escape Festival	Brighton	New Music festival for emerging artists	'One of the world's leading new music showcases', Ticketmaster.
	Brighton Festival & Fringe	Brighton	Annual arts festival	Largest annual arts festival in England.
	Brighton Pride	Brighton	Annual LGBTQ festival attracting attendance of 450,000.	Largest LGBTQ festival in the UK.
	Charleston	Lewes	Home of artists Vanessa Bell and Duncan Grant. Became meeting place for the Bloomsbury Group.	Internationally renowned historic collection.
	De La Warr Pavilion	Bexhill on Sea	Centre for the arts in an iconic Modernist building by the sea. 420,000 visitors 2019/20.	Attracts renowned international artists. Iconic building. Strong following on Twitter.



Source: Blue Sail online research

ADDITIONAL EXPERIENCES

Outdoor Activities

Sussex also provides a good offer for walking, cycling, horse riding and watersports, including:

- The Cuckoo Trail - a 14 mile route between Hampden Park in Eastbourne and Heathfield, for cyclists, walkers and horse riders.
- The South Downs Way – 100 mile National Trail from Winchester to Eastbourne.
- King Charles III England Coastal Path – includes a 33 mile stretch in Sussex from Shoreham-by-Sea to Eastbourne.
- The Downs Link – a 37 mile shared route linking the North Downs Way with the South Downs Way

- National Cycle Network – South Coast cycle route (NCN route 2), London to Eastbourne route (NCN route 21), Centurion Way, Chichester.
- Hove Lagoon – watersports tuition, hire and events.

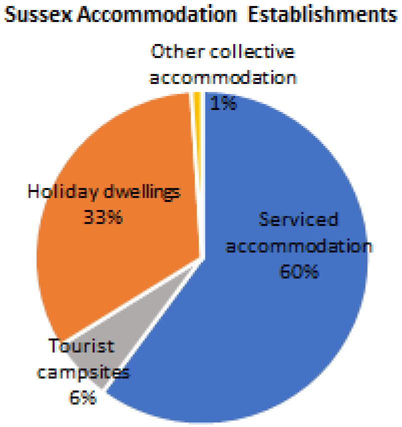
Food & Drink

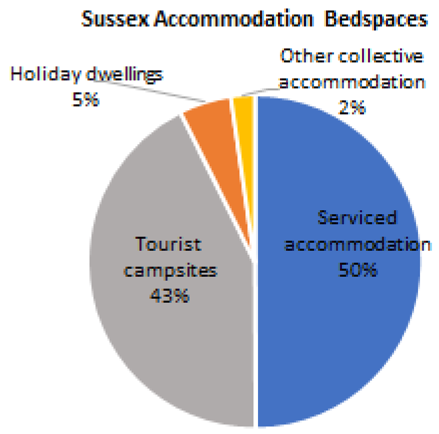
The Sussex food & drink offer is a further notable feature and includes an impressive array of vineyards, breweries, local markets, artisan shops, restaurants, cafes, pubs and food festivals. Food production is an important part of the Sussex economy and local producers are increasingly offering high quality visitor experiences such as tastings, tours, workshops and classes. Stand-out experiences include:

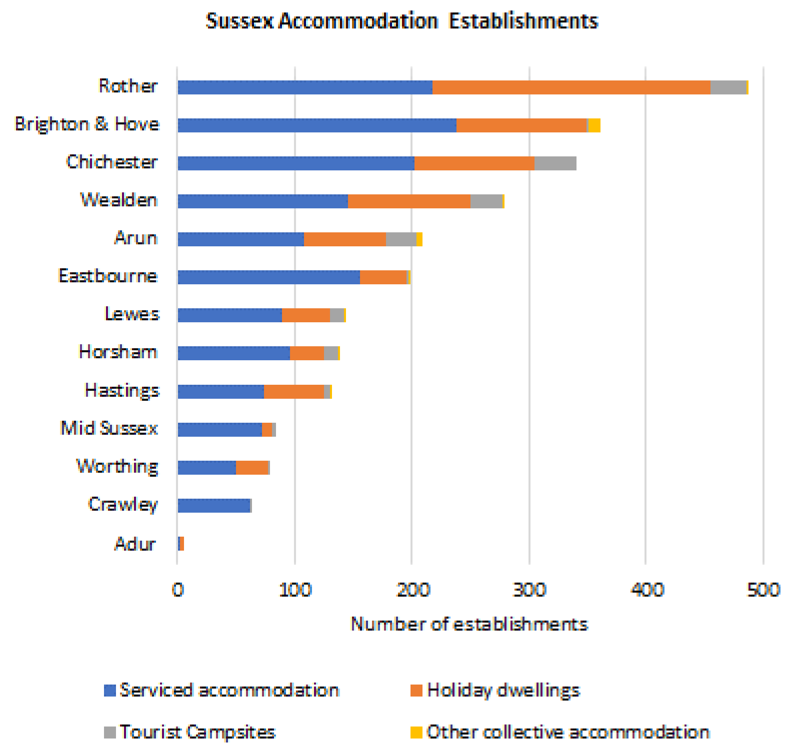
- Producers and markets such as Dark Star Brewing, Arundel Brewery, Harveys and Long Man, Middle Farm, Fish, Lewes Farmers Market, Rushfields Farm Shop, Tinwood Estate
- Restaurants and Inns such as Jeremy's, Gravetye, Tristans, The Pass, Gingerman, Earl of March and Fig Tree
- Independent casual dining such as The Perch, Angel Food Kitchen and the Crabshack

VISITOR ACCOMMODATION

In the absence of recent, local stock data, we have used the Visit England Accommodation Stock Audit, undertaken in 2016. Although the detail will have changed over the last seven years, it can still help to provide a broad picture of supply. It suggests that serviced accommodation accounts for 60% of establishments and 50% of bedspaces in Sussex; holiday dwellings (cottages etc) account for a third of establishments but just 5% of bedspaces; tourist campsites account for 6% of establishments and 43% of bedspaces. Analysis by district shows that the serviced sector accounts for the majority of establishments across Sussex apart from in Rother where holiday dwellings account for a slightly higher proportion. Touring campsites are most prevalent in Arun, Chichester and Wealden where they account for around 10% of establishments. UKparks.com lists 30 holiday parks in Sussex, with Chichester and Bognor Regis (Arun district) being notable camping/caravanning destinations.







Source: Visit England Accommodation Stock Audit 2016

Luxury Hotels

With fewer hotels now using star rating systems, it is difficult to obtain a definitive assessment of quality. Booking.com lists 265 hotels for Sussex, of which 181 have star ratings. Of these, 3% are five star, 49% four star, 41% three star and 7% two star.

Based on a review of booking.com, Trip Advisor, Telegraph Travel and luxury hotel collections such as Pride of Britain and Johannsen's, the following tables present a selection of luxury and boutique hotels in Sussex. The selection is intended to present a flavour of supply rather than being a fully inclusive list.

Table 11: Selection of Brighton Hotels

Hotel	Description
The Grand Brighton	Victorian-Italianate luxury hotel. Opened in 1864. 201 bedrooms.
Hotel du Vin & Bistro	Boutique hotel with Parisian-style bistro. Gothic-style buildings. 49 bedrooms.
Malmaison Brighton	Overlooks Brighton Marina. 73 bedrooms
Leonardo Brighton Waterfront	On the seafront. 210 bedrooms.
Brighton Harbour Hotel	On the seafront. 79 bedrooms.
The Square	Grade II Listed Regency townhouse. 10 bedrooms.
Hotel Una	Boutique townhouse B&B. 17 bedrooms.
Drakes Hotel	Boutique townhouse hotel. 20 bedrooms.
Artist Residence	Boutique hotel with artist-designed rooms. 25 bedrooms.

Source: Blue Sail online research

Table 12: Selection of Sussex Country House/Luxury Hotels

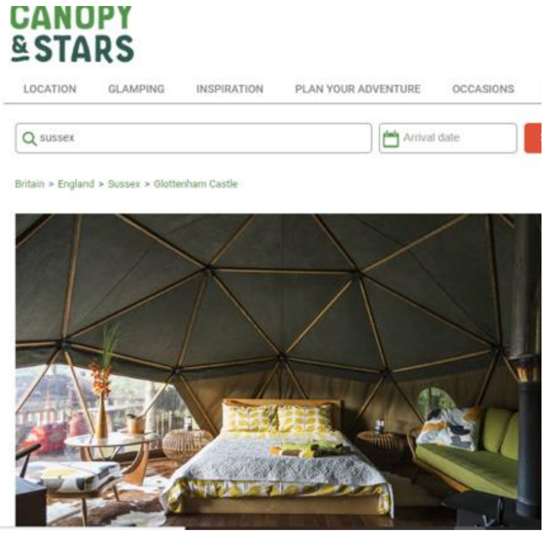
Hotel	Location	Description
The Grand Hotel	Eastbourne	5 star luxury resort hotel. 152 bedrooms.
Gravetye Manor	East Grinstead	Elizabethan Mansion set in 1,000 acres. 17 bedrooms. Michelin-starred restaurant.
Alexander House Hotel and Utopia Spa	East Grinstead	5 red star Jacobean Manor in 120 acres of gardens. 58 bedrooms.
Park House Hotel & Spa	Midhurst	Country House Hotel. 21 bedrooms.
The Spread Eagle Hotel & Spa	Midhurst	One of England's oldest coaching inns dating back to 1430. 39 bedrooms.
South Lodge	Horsham	Victorian Country House. 89 bedrooms.
Ghyll Manor Hotel	Rusper, Horsham	17th Century Manor House. 29 bedrooms.
Bailiffscourt Hotel & Spa	Arundel	20s mock medieval mansion in 30 acre parkland. 39 bedrooms.
Amberley Castle	Amberley	Relais & Chateau hotel. 12th century castle. 19 bedrooms.
Ockenden Manor Hotel & Spa	Cuckfield, nr Haywards Heath	Elizabethan Manor House hotel. 28 bedrooms.
Goodwood Hotel	Goodwood	18th century former coaching inn at gateway to Goodwood Estate. 91 bedrooms.
Ashdown Park Hotel & Country Club	Wych Cross	Country House Hotel, 106 bedrooms.
PowderMills Hotel	Battle	Country House Grade II listed hotel. 49 bedrooms.
Wingrove House	Alfriston	19th century colonial-style country house hotel. 16 bedrooms.
Buxted Park Country House	Buxted, Uckfield	Palladian country house hotel set in 312 acres of grounds and parkland. 44 bedrooms.

Source: Blue Sail online research

Notable Glamping

Pitchup.com lists 20 glamping sites in East Sussex and 12 in West Sussex that offer yurt, tipi, bell tent, dome or wigwam accommodation. ‘Canopy and Stars’ is a camping collection of ‘the most inspiring places to stay in the great outdoors’. Their website lists 31 properties in Sussex including a Big Green Bus in Lewes, a geodome, yurt and woodland cabin at Glottenham Castle, treehouses at Downash Wood, yurts and cabins at Forest Garden. Conde Nast

Traveller's 'The Best Glamping in the UK' (March 2021) includes two sites in Sussex – Wowo in Uckfield which offers educational workshops, and the geodome at Glottenham Castle. Blackberry Wood in Streat offers quirky accommodation including a double decker bus, fire engine, helicopter, gypsy caravan, tree houses and cabins.



Short-Term Lets (Airbnb/Vrbo)

AirDNA (provider of short-term rental data for Airbnb and Vrbo) reports 8,007 ‘entire home’ active rentals for Sussex and 2,235 private rooms as of July 2023. Two-fifths of properties are available full time. The short-term rental market has grown exponentially in Sussex. In July 2021 we counted a total of 5,473 active rentals in Sussex; this figure now stands at 10,253 – an increase of more than 83% within two years. Current 2023 data is provided below:

Table 13: AirDNA data

	Sussex
Entire home	8,007
Private room	2,235
Shared room	10
Total active rentals	**10,253**
Entire home rentals as percentage of total active rentals	78%
% available full time	41%
Average rental size (bedrooms)	2.1
Average rental size (guests)	4.7
Airbnb ratings (% at least 4.5 overall)	86%

Source: AirDNA

BUSINESS TOURISM

Cambridge Model district economic impact reports from 2019 provide the following estimates of overnight business tourism trips across Sussex:

Table 14: Sussex Staying Business Trips, 2019

Destination	Number of business trips	Proportion of total staying trips
Crawley	172,000	37%
Hastings	161,000	31%
Brighton & Hove	134,000	8%
Worthing	104,000	33%
Eastbourne	78,000	10%
Mid Sussex	38,000	10%
Arun	31,000	5%
Chichester	14,000	2%
Lewes	12,000	3%
Horsham	12,000	5%
Rother	10,000	2%
Adur	6,000	9%
Wealden	5,000	1%
Total Sussex	**777,000**	**11%**

Source: District Economic Impact reports

Brighton & Hove, Eastbourne, Hastings, Crawley and Worthing, together account for 84% of overnight business trips in Sussex.

Brighton conference venues

For the conference market, it is Brighton and Eastbourne that are the principal destinations.

Brighton is a popular destination for meetings and events and the most successful of the UK's coastal resorts achieving 15th position in the UK rankings for corporate and national association meetings (source: Market Study for New Arena and Conference Centre Brighton, First Draft, The Right Solution, April 2020).

VisitBrighton lists 47 conference venues on its website. Twenty six are 'unusual venues', 13 are hotels, 3 academic venues, 3 sports venues, 1 conference/training venue and 1 purpose built. The Brighton Centre is the main conference centre which attracts large, association conferences to the city. There are 3,000 hotel rooms within walking distance of the Centre. Given the Brighton Centre's prominence within the city's conferencing offer, there is a need to ongoing investment to remain competitive with the development of facilities in other locations who are competing in the same market.

The main venues with largest capacities are:

Table 15: Brighton Conference Venues

Venue	Number of meeting rooms	Maximum capacity
Brighton Centre	23	4,450
Brighton Dome	5	1,700
Hilton Brighton Metropole	33	1,000 plus 8,000 sq. m exhib. space
Grand Hotel	13	900
Brighton Racecourse	18	650 plus1,500 sq. m exhib. Space
American Express Community Stadium	31	550
Sussex County Cricket Ground	5	800
University of Sussex	100	500
Jury's Inn Waterfront	6	320

Source: Market Study for New Arena and Conference Centre Brighton, First Draft, The Right Solution, April 2020

Eastbourne conference venues

Eastbourne's conference offer is located within the Devonshire Quarter, providing meeting, conference and exhibition space in a number of Grade II listed buildings. Venues include:

Table 16: Eastbourne Conference Venues

Venue	Capacity (theatre style)
Congress Theatre Auditorium	1,655
Welcome Building	988
Devonshire Park Theatre Auditorium	857
Winter Garden	1,000
The International Lawn Tennis Centre	180
Locker Room	60

Source: Visit Eastbourne website

Outside of the Devonshire Quarter, venues include Eastbourne Town Hall, Eastbourne Downs Golf Course and the Towner Art Gallery. In addition, the five-star Grand Hotel Eastbourne has 17 meeting rooms, the largest having a capacity of 300 (theatre style). The hotel has 152 bedrooms.

Other Sussex conference facilities

Across Sussex, many of the larger and chain hotels offer meetings rooms and conference facilities. For example, South Lodge Hotel in Horsham offers 17 meetings rooms with capacity up to 170 delegates (theatre style); the Ashdown Park Hotel in Wych Cross has 16 meeting rooms with capacity up to 160; the Alexander House Hotel in East Grinstead has 7 meeting rooms with capacity up to 120 delegates. At the heart of the Goodwood Estate, Goodwood House can host meetings of up to 245 and the Goodwood Hotel, meetings of up to 150.

Further venues include The De La Warr Pavilion with auditorium capacity for 1000, The Hastings Centre with a capacity of 800; Sussex Coast College Hastings (capacity 200); The Hawth Crawley (capacity 862); the City Coast Centre, Portslade (capacity 350); and the South of England Event Centre, Ardingly. Other sporting venues also exist as meeting venues (Plumpton, Brighton and Fontwell).

6 COMPETITORS & COMPARATORS

KEY POINTS

While the launch of VisitEngland's LVEP accreditation scheme means there is national recognition of the power of collaborative local partnerships in developing and growing the visitor economy, the fact that there is no 'cookie cutter' model for the perfect tourism partnership remains. Different LVEPs operate in different ways depending upon their local circumstances. As comparators for Sussex we have included data on Visit Kent and Visit West (Bristol and Bath) as two DMOs that have recently been accredited as LVEPs. Both of these LVEPs takes a different approach to partnership, funding and destination management but they offer insights and learning for Sussex.

Kent (LVEP: Visit Kent)		Learning for Sussex
Why Chosen	• Potential Sussex competitor given product, landscape and location. • Insight into organisational structures and delivery. • History of strong working relationship between the individual authorities and Visit Kent. • Popular day & stay trip destination for London market. • Go To Places – a 'commercial' arm of Visit Kent.	
Destination Context	• **Local authorities:** Ashford, Canterbury, Dartford, Dover, Folkestone & Hythe, Gravesham, Maidstone, Sevenoaks, Swale, Thanet, Tonbridge and Malling, Tunbridge Wells. • **Size:** approximately 3,700 km^2 • **Population:** 1.6 million. • **Distinct features/products:** The White Cliffs of Dover; Canterbury Cathedral; Dover Castle; Leeds Castle; Garden of England; Turner Contemporary; Chartwell; Whitstable; Dungeness. • **Market size (2019):** ▪ Domestic overnight trips: 2.7 million	Sussex stats for reference: Size: approximately 3,700 km^2 Population: 1.7 million. Domestic overnight trips: 4 million Overseas overnight trips: 1.5 million Day visits: 51 million

	▪ Overseas overnight trips: 1 million ▪ Day visits: 51 million • Visitor website: Things To Do, What's On, Accommodation - Visit Kent	
Destination management	• Visit Kent (est.2002) is the official DMO services provider to Kent County Council, Medway Council and Kent's district and borough councils • It is the consumer and corporate destination brand for county and manages 2 national Discover England Fund (DEF) projects – England's Creative Coast and Gourmet Garden Trails of England • Accredited LVEP (April 2023) • Serves 2 x County Councils, 12 x Districts & Boroughs • One pan-county destination umbrella brand plus 7 x local destination websites • Manages data and insight, itinerary development, destination websites (1 pan-county and 7 local) and marketing campaigns for Kent • Takes a commercial approach to destination management informed by its team's experience working with other destinations on a consultancy basis via Go To Places. Additionally, major private sector businesses are represented on Visit Kent and Go To Places' board – including Port of Dover, Go-Ahead Group and Shepherd Neame Brewery	Private sector led board. Insight-driven approach to destination management – sharing data with partners to inform collective decision-making. Joint marketing campaigns to achieve greater reach. Shared websites/digital back-office to offer resource and cost efficiencies
Operational structure and partner collaboration	• Has a successful paid membership programme with c.150 businesses 'of scale'. Smaller businesses are represented through their borough/district council • Has launched a commercial venture in collaboration with creative and media agencies specialising in destination marketing. The Roofbox Collective will provide another source of income to invest in Visit Kent and Go To Places • Private sector led board, c. 20 FTE employees	Commercial expertise gives confidence to private sector partners.

Marketing channels and joint marketing activity	• **EXPERIENCE** is a project that provides support for businesses, individuals and organisations to develop new, off-season tourism experiences. • Four-year scheme (2019 – 2023), total budget €23 million across 10 partners in France and England. Led by Norfolk County council, Visit Kent and Kent Downs AONB are core partners with budgets of €1.6 and €3.1 million respectively. • The project aims to capitalise on the trend for personalised and local tourism experiences. The project's six areas are: Kent, Norfolk, Cornwall, Pas-de-Calais, Brittany and Compiegne. Visit Kent is working with its local authority partners to engage both tourism and non-traditional tourism actors across Kent in an innovative Product Development Programme. The aim is to attract 20 million new visitors by 2023, to generate 1 billion euros additional spending, and increase visitor spending by 5% in the off season alone. • The campaign has 8 thematic features hosted on the Visit Kent website. All EXPERIENCE partners, and private sector partners that have paid their investor fee, are featured in the campaign activity. As part of their INTERREG EXPERIENCE match funding, eight districts have been included as lead destinations within the feature content.	Strong regional collaboration – working with partners outside of Kent.
Bristol/Bath		**Learning for Sussex**
Why Chosen	• Insight from visitor facing and behind the scenes operations.	
Destination Context	• **Local authorities:** Bath & North East Somerset, Bristol City. • **Size:** approximately 460 km² • **Population:** 0.66 million • **Distinct features/products:** City of Bath, Roman Baths, Thermae Bath Spa, City of Bristol, waterfront, International Hot Air Balloon festival, Banksy. • **Market size (2019):** ▪ Domestic overnight trips: 2.7 million ▪ Overseas overnight trips: 1.0 million	Sussex stats for reference: Size: approximately 3,700 km² Population: 1.7 million. Domestic overnight trips: 4 million

	▪ Day visits: 23 million • Visitor websites: • [Bath's Official Tourism Site | Visit Bath] • [Visit Bristol - Official Bristol Tourist Information Site]	Overseas overnight trips: 1.5 million Day visits: 51 million
Destination management	• In 2021 Visit Bristol and Visit Bath came together as Visit West - one organisation to provide regional DMO services for West of England in order to integrate regional expertise into a single team, minimise the duplication of effort across the destination and support activity that helps visitors to experience the breadth of the West of England. • Accredited LVEP (April 2023). • Serves 4 x Local Authority areas (who have shares and a governance role). • Creating a single point of contact for bigger partners working across a wider area, e.g. cruise ship companies, airport, regional breweries has led to stronger and closer relationships with these bigger partners, creating more sponsorship and joint working opportunities and offering those businesses the benefits of a single membership.	Use of visitor-facing brands that make sense to consumers, while a new corporate brand reassures partners and stakeholders about the bigger combined opportunity offered by South West, rather than just Bristol or Bath individually.
Operational structure and partner collaboration	• Visit West is corporate brand, Visit Bristol & Visit Bath consumer brands. Conference bureau is Meet Bristol & Bath. • A focus on market opportunities. Visit West has maintained the distinctive consumer-facing identities of Visit Bristol and Visit Bath, whilst being a single point of contact to support businesses and help them identify opportunities for collaboration to drive visitor value across the wider destination • Promoting Bristol as the leading destination for conference venues, while positioning Bath as the incentive location for MICE markets has helped to increase the appeal of the overall destination	Going from informal collaboration to formal partnership may take a long time to achieve and be hastened by external concerns. In the case of Bath and Bristol, Covid has been a key factor in moving forward more quickly.

	• Integrating cross-destination expertise into a single team. Playing to team members' strengths while bringing together their collective knowledge to develop and promote the breadth of the destination • Identifies where in back office functions can be integrated to drive operational efficiencies (i.e. websites, shared legal and procurement services) • Majority income via commercial partnership, supported via core funding from Local Authorities.	An integrated team brings a diversity of experience and knowledge that can be applied to benefit the whole destination.

2021 CONSULTATION SUMMARY

In 2021 we consulted with a cross-section of informed stakeholders as well as those with a view from outside Sussex on the challenges and opportunities the destination faced. Our findings from the consultation are outlined here to illustrate the basis upon which the Sussex visitor economy vision and associated actions were developed.

Challenges

- **Sussex is fragmented and missing out on opportunities.** In a recent Observer piece on coastal food locations, Sussex was absent. Not because it doesn't have things to say but because getting the information requires 8 phone calls rather than 1.
- **Sussex's competitors have a stronger identity.** Places like the New Forest, Isle of Wight, Cotswolds and Devon are just better known and easier to understand. The cultural identity of Sussex was thought to be weaker and the residents lack the distinctive character of other destinations. Visitors are unfamiliar with Sussex's geography. Sussex is 'quintessentially English' though not more so than other places. Sussex doesn't have a 'wrapper' unlike 'Kent – Garden of England'.
- **Individual destinations and experiences are better known than Sussex**. And many of these leading brands make no references to Sussex. It was thought the seaside towns stood out but that the inland towns got lost and familiarity was less.
- **Popularity can leave honeypots feeling unloved.** Especially in Brighton where impact on high-end e.g. conference is impacted by rowdy behaviour.

- **What do you want to be famous for?** A key questions that was raised because many thought Sussex quite indistinct.
- **City- Region doesn't work in positioning.** Too much of a confusion in the offer and market misfit. But more potential for collaboration.

Opportunities

- **Sussex has good experiences**. It is known for its heritage, coast, downs, vineyards, culture & festivals. But these need to be packaged and presented more coherently. They are not really linked in peoples minds. Itineraries could help connect up experiences better.
- **The proximity of London and Gatwick is a huge asset.** Ease of access and value for money are strong.
- **How do you choose one beautiful view over another?** Actually, it's about the hidden gems and elevating these.
- **More could be made of thematic strengths.** Themes such as film, literary, gardens, food and drink.
- **Use communities to showcase 'local'.** More could be done with initiatives like Love Arundel – as a possible exemplar.
- **Collaboration for big opportunities**. And local delivery for other activity. Will only get a look in on opportunities like international marketing via VisitBritain by working together.
- **Rural accommodation needed.** Existing can't meet demand.
- **Environmental and Green.** Seen as an asset for Sussex. But need to make the most of it. Works with near Europeans and important for domestic too.
- **Positive impact of tourism understood by local communities.** Tourism needs to be seen as a force for good and local communities supported to extend a warm welcome.
- **Food a great way to connect urban and rural**. And to make the links between local produce on the plates in the restaurants with the Sussex landscape.
- **More active and participative sport.** Particularly cycling networks which could be used as a way to link up assets and turn a visit into an exploration.
- **Convention Bureau activity for Sussex**. Well established in Brighton. Why not extend to Sussex.
- **Travel less – stay longer.** Easier to get to than other destinations but no less compelling an offer. Key is quality and value (not about cost).

- **Stronger partnerships.** Interesting model from the South West where a business plan and now funding plan are being developed. Centred on collaboration around research, recovery, sustainability, digital and seasonality. Accountable partners and work programmes that individual DMOs bid for and lead on and which are supported by the LEPs.
- **Explorers and Experience Seekers.** International segments which VB think are ripe for Sussex. Kent targeting them and Sussex should too. Work on connecting the experiences and addressing the 'final mile' challenge for international visitors – actually easy for Sussex. International want 'remember forever experiences' and 'goose bump' experiences – it has to be special.

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is delivered in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance