BLUE SAIL

VISITORS PLACES DESTINATIONS

SUSSEX VISITOR ECONOMY BASELINE REPORT

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1. SUMMARY FINDINGS

We have reviewed and analysed the available data, policies, market information and Sussex tourism offer and looked at some comparator destinations. This has helped us build a picture of how Sussex is currently performing and some of the challenges and opportunities it faces in developing a vision and action plan to shape future collaboration and develop the visitor economy.

Our main findings are:

- The Sussex Visitor Economy is very large and significant with £3.9bn of spend (£5bn of impact), an amount that is comparable to Iceland and 2/3 that of Wales, and it deserves to be taken seriously as an economic driver for the region.

- There are many plans and policies in place which are supportive of tourism development and growth across the county but the multiple organisations and plans indicate fragmentation between the different areas with regard to tourism development, management and marketing. There is no pan-Sussex destination marketing for example.

- Visitor markets across Sussex are broadly similar (mature empty nesters), except in Brighton where they are generally younger. Families are not a significant market for Sussex except in one or two specific areas.

- The majority of Sussex visitors are from surrounding counties. There is some evidence that Brighton is reaching markets further away but the rest of Sussex is not in the main.

- There are gaps in Sussex visitor data. While we have managed to identify and review data for most of the County, there are slight inconsistencies in availability and when the data was produced. This is also the case for market insights such as visitor surveys.

- In many destinations an urban centre can act as an important gateway to the rural hinterland. Given the market differences (Brighton/Sussex) we are not convinced that the gateway opportunity is as significant for Brighton/Sussex although it will exist where there is market overlap.

- Staying visits (11% visits and 50% spend) and in particular overseas staying visits (2% visits and 19% spend) are very significant for Sussex with above England-average spend and visitor numbers. However average length of stay (2.68 days East Sussex and 2.46 days West Sussex) is lower than the England average domestic visitor (2.98). International length of stay in East Sussex (8.0 days) is greater than the England average (6.99 days).

- The Sussex product and visitor experience is varied and contains many significant assets. There are a few clusters of experience that are unique e.g. vineyards and to some extent the range of cultural attractions. Likewise the landscape is distinctive and in many ways quintessentially 'English' though certainly not 'dramatic'. Much of what Sussex has to offer however is thematically indistinct from other competing destinations (heritage towns and attractions, coast, countryside, gardens, events & festivals and activities).

- Sussex doesn't feature as strongly in some media as would be expected. In some cases this is because platforms such as Tripadvisor follow the authority boundary classifications of East and West Sussex. This exacerbates a lack of awareness of Sussex as a whole and it's positioning.

- Dependency on tourism in Sussex is highlighted in some policies and this can be interpreted as something that is good or bad. Policy-makers might look to diversify away from and disinvest in tourism because of this perceived 'dependency'. But tourism is part of Sussex's economic DNA and there is an argument that it should be supported more strongly to grow and help wider policy initiatives (reducing inequality, increasing employment, industrial growth, inward investment etc)

- There is significant competition for visitors and increasing research that suggests shortlisting of possible destinations is based on non-conscious ideas of how a destination makes them feel. Smart destinations are recognising that in order to get on a visitors shortlist they have to have a clear positioning that is easily articulated by the whole destination. The fragmented approach in Sussex makes this hard to achieve.

- The DMO arrangements in Sussex are largely public-sector led (even though many have strong support from business and some have private sector board members). This means they are well-placed to support public policy initiatives but may be less highly regarded (even if only a perception) for their marketing and business development prowess. Much of the marketing is product focussed (in order to satisfy businesses) rather than market focussed.

2. STRATEGIC & POLICY ENVIRONMENT

KEY POINTS

- DCMS is currently undertaking a review of destination management organisations with a Tourism Recovery Plan likely to follow in Summer 2021. The outcomes of this review will be particularly pertinent to Sussex given its complex tourism picture, with eight official DMOs and a further five unofficial promotion partnerships/tourism websites in operation at a district and borough level.
- There is very little strategy or promotion that exists at a Sussex level; it is either a sub-picture from east or west - and even within east and west, there are differing approaches and priorities within the sector – or a more macro regional position coming from organisations like SDNPA.
- With both LEPs on hold with progressing their Local Industrial Strategies while they focus on overcoming the economic challenges arising from Covid-19, the long-term direction of local economic policy lacks some clarity. However, in their draft LISs, both LEPs place an emphasis on improving connectivity into the county - with Coast to Capital looking to exploit the area's close proximity to Gatwick airport - and growing employment and skills in the sector.
- There is a commitment to sustainable tourism across the region, with a focus on improving the value and quality of visitors (longer stays and more retained spend) and spreading visits across the year, as opposed to increases in visitor numbers. SDNPA is playing a leading role in this.
- Brighton is taking a proactive approach to establish its role as city in the region. It is unclear whether a city region approach would work across the whole of Sussex.
- There are vast differences in the level of tourism provision within the individual districts and boroughs, from those with tourism teams working to visitor economy strategies or destination management plans to those with no dedicated tourism resource and very little reference to the visitor economy in their economic development plans.

- There are some common tourism themes and product development aims across the various local authority areas. Several local authorities show a commitment to improving their walking and cycling infrastructure, to expanding the quality and diversity of visitor accommodation provision and to increasing the number of quality food and drink experiences.

NATIONAL CONTEXT

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. In implementing the Government's tourism plan and the Tourism Sector Deal, VisitEngland's 5-year strategy (2020-25) highlights the following aims:

- Developing regional English tourism product
- Distributing and promoting product to our domestic and international customers
- Helping businesses to grow through business advice and support
- Growing the business events industry

VisitEngland Strategy:
Grow 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.

Support productivity
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.

Drive regional dispersal
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.

Be the expert
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:
- *Buzzseekers – 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 buzzseekers, 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.

DCMS Tourism Recovery Plan and Destination Management Review

In March 2021, the Department of Culture, Media and Sport commissioned a review of Destination Management Organisations led by Chairman of Visit England, Nick De Bois. The review is examining the extent to which the current DMO landscape:

- Is economically efficient, effective and sustainable (with regard to funding, structure and performance)
- Best enables the government to meet its leisure and business tourism policy objectives at a national, regional and local level
- Engages within the wider local and regional economic landscape, and the current focus on English devolution and Levelling Up

The review will make recommendations on:

- Whether DMOs might be structured or funded differently, and if so how any proposals might maximise post-COVID-19 recovery and long-term success
- What the role of DMOs should be, bearing in mind existing other local structures such as Local Enterprise Partnerships, Mayoral Combined Authorities, local authorities and other similar local/regional bodies, and where these might intersect

- How DMOs should best engage with, and be engaged by, VisitEngland, VisitBritain and DCMS, as well as wider government/public bodies where relevant (e.g. Arts Council England; UK Sport)

It is likely that DCMS will launch a Tourism Recovery Plan following the outcome of this review in Summer 2021. The Recovery Plan will replace the previous sector deal and tourism zones which, since the onset of Covid-19, are no longer deemed fit for purpose.

Business Visits & Events Partnership

Pre-Covid, in early 2020 the Business Visits & Events Partnership (BVEP) launched 'The UK Events Report' 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. Evidence in the report suggests that there is an opportunity to use both markets to showcase the UK's abilities and resources and bring communities together.

It also highlights a need for the UK to realign and revitalise its commercial footprint, after leaving the European Union and the ongoing COVID-19 outbreak, to drive businesses back to their peak and forge a new position on the global stage. Events held in the UK will play a critical role in achieving this.

As a country, the UK has vast selection of high quality and richly varied purpose-built event venues and historic buildings suitable for hosting world-class events. It also has a network of talented and creative suppliers and organisers offering state-of-the-art technology and equipment for events.

The UK events industry is committed to assisting new events to align with key sector priorities, to use events in order to promote UK businesses and their products and services, to attracting more international events and grow already successful events.

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 September 2020, NCTA published a report assessing the impact of Covid on coastal tourism. NCTA is lobbying for funding to deliver a recovery programme until 2023-24 to build back better and get the coastal tourism economy back to pre-COVID levels.

England's Coast

Sussex is featured as part of the South East 'Creative' Coast on England's Coast, a new tourism initiative run by the National Coastal Tourism Academy in partnership with Visit England (funded in part by Visit England's Discover England Fund) and P&O Ferries. Designed to attract greater numbers of international visitors, it lists things to do via an interactive map, gives a selection of itineraries, a series of blogs and links to book direct with businesses. Its trade portal features an itinerary builder which allows tour operators to create coastal packages from the wealth of products on offer, including accommodation, attractions, places to eat and events.

REGIONAL CONTEXT

Sussex is part of two Local Enterprise Partnerships – South East LEP (SELEP) covering East Sussex and Coast to Capital LEP (C2C) covering predominantly West Sussex. In December 2018, Government announced the entire country would benefit from Local Industrial Strategies (LISs). Local Enterprise Partnerships (LEPs) were asked to lead this process on behalf of local areas through negotiation with Government.

Coast to Capital Local Enterprise Partnership

In January 2020 Coast to Capital LEP submitted five logic chains to the Government's LIS Panel. The logic chains were formed around the Foundations of Productivity from the UK Industrial Strategy with each one setting out the challenge, the intervention and the outcome. The five logic chains submitted were:

- People: local talent pipeline
- Business environment: business growth and space
- Places: sustainable growth and natural capital
- Infrastructure: 5g digital region and smart, clean mobility
- Ideas: innovation acceleration

Logic chain three looks to exploit the area's close proximity to Gatwick airport by creating a marketing vehicle to 'promote our growing experience economy to international markets using new connections to Gatwick'.

Work on the LIS is paused whilst the LEP focuses on its Covid-19 response.

South East Local Enterprise Partnership (SELEP)

SELEP's 2018 Economic strategy Smarter Faster Together outlines the action it will take, over the next five years, to deliver on the Government's National Industrial Strategy, setting it on a pathway towards a robust Local Industrial Strategy for the South East. It identifies five priority areas to guide SELEP's actions for the medium term over the next five years:

- Priority one – creating ideas and enterprise
- Priority two – developing tomorrow's workforce
- Priority three – accelerating infrastructure (rail and road connectivity)
- Priority four – creating places
- Priority five – working together

The publication and implementation of the SELEP LIS is on hold while the economic challenges arising from Covid-19 are being considered.

South East Creative Economy Network (SECEN)

SECEN works with SELEP to accelerate growth in the digital, creative and cultural sector. It is a working partnership between local authorities, creative businesses and education bodies across the South East LEP area.

Amongst a number of initiatives, it is supporting the England's Creative Coast Discover England Funded project (led by Culture Kent and ESCC) – England's Creative Coast aims to grow the visitor economy by 3% in East Sussex, Kent and the Thames Estuary, generating 4,700 new jobs over a three-year period. It is designed to respond to current visitor behaviour trends, tap into new markets and will create a step change for the galleries and the tourism sector across the area. It addresses the challenges of the South East as a destination with no one major urban centre and builds practical and scalable initiatives and interconnections across the South East and beyond. The project will continue to stimulate further innovation and growth beyond the lifetime of this project.

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.

Tourism South East (TSE)

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
- Visit Brighton
- 1066 Country
- Discover Worthing
- Visit Eastbourne
- Sussex by the Sea

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 is a new cultural experience – the world's first art geotour. It will see 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 is 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.

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, Visit Brighton and South Downs National Park as well as Visit Surrey, Surrey Hills and West Kent Partnership.

LOCAL CONTEXT

Brighton & Hove City Council (BHCC)

BHCC's Corporate Plan A Fairer City, a sustainable future has six priority outcomes. They are:

- One - A city to call home
- Two - A city working for all
- Three - A stronger city
- Four - A growing and learning city
- Five - A sustainable city - We will increase accessible open space for the benefit of residents and visitors.

- Six - A healthy and caring city

As part of priority two BHCC pledges to:

Protect the uniqueness of Brighton & Hove with our independent shops, cafés, bars, and our distinctive arts and cultural offer. We will work with local businesses to deliver our visitor economy strategy and destination experience plan. We will continue to work to raise money to restore our heritage including the Madeira Terraces. We will also consider a voluntary tourist tax, a coastal business improvement district, and a combined discount card for tourist attractions, local businesses and public transport. We will seek investment to improve the accessibility of our seafront and beaches and invest in seafront infrastructure.

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.

There is talk of the creation of a Brighton Plus experience to get visitors to stay longer and spend time exploring the region including The South Downs National Park, historic houses and gardens and vineyards, art galleries, cultural venues and festivals.

Also on the cards is the creation of a new place brand, retaining much of the current brand's components, particularly the emphasis on culture and wellness, but with further understanding about what it truly means to be a free-thinking city and the difference that makes to what people say, show and share…and how they say, show and share it. As part of the new place brand, the city will review its current visitor experiences and events & festivals.

On the conferencing side, the main focus is on association conferences, looking to exploit London Gatwick - targeting international opportunities served by airlines operating out of Gatwick.

To deliver the strategy, BHCC is working towards a two-tiered approach to tourism within Visit Brighton – strategic and tactical – in which the strategic tier is a new addition focusing on product and market development. It is currently in a transitional phase.

East Sussex County Council (ESCC)

The ESCC Council plan 20/21 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

As part of priority one, ESCC pledges to:

Build on the county's economic strengths and unique characteristics to drive economic growth in sectors with the most potential to grow and provide employment. We will build on the areas where the county already performs strongly, such as culture and tourism. We will:

- *Deliver Culture East Sussex agreed actions to grow Cultural Tourism*
- *Monitor the impact of Covid 19 on the tourism economy, plan for recovery, and deliver one strategic pilot action*
- *Deliver first wave of England's Creative Coast with the installation of three new art works*
- *Grow the visitor economy by raising the visibility of East Sussex, enhancing perceptions, increasing the number of visitors to the coast, and increasing length of stay and spend*

Culture East Sussex is a partnership group formed in 2014 to pool collective experience and knowledge in order to advise on and monitor the implementation of the East Sussex Cultural Strategy (2013-2023). The Strategy aims to ensure that there is a well packaged, clearly signposted, regularly refreshed cultural tourism offer in East Sussex and that people choose to visit because they are confident they will have distinctive and exceptional cultural encounters and they will stay longer because of the choice which is on offer. It has three complementary and interdependent priorities:

- Priority One - Create an environment where great cultural experiences are available to everyone to enhance their quality of life
- Priority Two - Create an environment which enables the cultural and creative economy to expand and enhances our ability to attract and retain other businesses
- Priority Three - Develop and promote well packaged cultural tourism offers which celebrate the identity of East Sussex, raise its profile and attract more visitors and businesses to the County.

Achievements to date include:

- Sussex Modern shared marketing, expanded in 2019 to include co-promotion with Sussex Wineries
- East Sussex Coastal Culture Trail

- Gatwick Gateway itineraries on Gatwick website and local images on vinyl in Gatwick Arrivals summer 2019
- £1.2m+ England's Creative Coast bringing together SELEP and West Sussex to deliver an art and geocache trail to attract international visitors and increase tourism spend.

Recent opportunities have raised questions about whether the current structure of Culture East Sussex is fit for purpose to maximise its role as an enabler. The governance and recruitment model of the group is therefore being reviewed and options considered to introduce a legal framework, as well as the development of a Cultural Investment Framework to deliver a number of work packages over the next ten years including:

- Cultural Tourism packages – linked to inward investment, recruitment and retention
- Place making – enable the sector to be market leaders in the development of a sustainable economy
- Work with planners and developers to enable infrastructure improvements to achieve growth

Wealden District Council (WDC)

Within its current local plan, WDC lists its priorities as being to:

- Conserve natural beauty – Wealden's core product and main attractor;
- Raise awareness – locally and to wider audiences before they visit;
- Encourage and increase staying visitors – particularly off season;
- Encourage and increase visitor spend – from day and staying visitors and
- Deliver a fulfilling and enjoyable experience that exceeds visitor expectations and delivers positive recommendations.

It began commissioning in-depth research in 2017 to inform the development of a new Destination Management Plan. This work is being progressed as part of the new local plan.

The council is particularly investigating the potential areas of the tourism industry that are likely to see a rise in popularity and growth, such as viticulture and experiential tourism, as well as undertaking work into visitor accommodation to inform future local plan policies. The visitor accommodation work will consider the specific requirements of the hotel, bed and breakfast and camping industries, including providing a needs assessment for such types of overnight accommodation.

The following policy options are being considered:

- Provide planning policies that support and encourage the sustainable growth of the tourism and cultural offer of the District through the delivery of new tourism businesses as well as supporting the expansion of existing business.
- Provide planning policies which facilitate, subject to criteria, proposals that deliver high quality and sustainable tourism experiences including enhancing visitor experiences; increasing the length of stays and encouraging year round tourism.
- Provide planning policies specific to the types of tourism accommodation we want to encourage and offer, taking account of any relevant evidence base data.
- Provide policy support for farm diversification in regard to tourism offers be that accommodation or experiences.
- Look at providing policies which support and facilitate the sustainable delivery of experiential tourism such as viticulture.
- Consider policies that provide opportunities for visitors to increase their awareness, understanding and enjoyment of the special qualities of the district.
- Consider the location and design on any tourism related development to minimise the need for travel by car and which encourages travel by other sustainable means such as public transport, walking and cycling.
- Ensure that any planning policies for tourism development will not lead to adverse effects on the character, historical significance, appearance or amenity of the district. This includes avoiding adverse impacts on the vitality and viability of village and town centres.
- Provide polices that prevent the loss of visitor accommodation, visitor attractions and recreation facilities unless under very specific circumstances.

Rother District Council

Within the visitor economy chapter of the council’s economic regeneration strategy, Rother District Council commits to supporting the visitor economy by being:

- An advocate of the industry – promoting awareness, encouraging growth in number of high-value added visitors, lobbying for uptake of careers in the industry
- A service provider and legislator – commissioning and funding research, offering business support, delivering or support infrastructure developments, encouraging the provision of new good quality accommodation
- A partner and enabler – continuing to support 1066 Country, supporting, funding and promoting visitor events, work with developers and landowners to encourage the development of more serviced accommodation
- A deliverer of projects e.g. coastal environment improvements to East Parade, Bexhill and development of a walking and cycling strategy

Hastings Borough Council (HBC)

HBC is working to a Culture-led regeneration strategy (2016-2021) which, with culture at the heart of its identity and regeneration, aims to deliver long term economic and social benefits for all, making Hastings a highly desirable place to live, work, visit and invest. For visitors specifically, it is aiming to attract UK and overseas tourists year-round to a high-quality cultural offer, supported by high quality food and accommodation.

Within its six objectives, there are three that relate to 'visit'. They are:

- Working with 1066 Country, develop and promote a refreshed identity for Hastings which brings contemporary culture and heritage together in a coherent and marketable brand
- Support and develop a high-quality year-round cultural programme, that links to regeneration and tourism strategies
- Support and enable the preservation, development and use of our cultural assets

West Sussex County Council (WSCC)

The WSCC Reset Corporate Plan 2021-2025 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 West Sussex Economic Growth Plan 2018-2023 in which there is a section committed to 'Promoting visitors and vibrant places.' It recognises that there is a missed opportunity for the county and there is the potential to grow the sector by:

- Improving the tourism and experience offer
- Attracting new and younger audiences
- Extending the visitor season; and increasing opportunities to spend.
- Furthering activity linked to Gatwick Airport to help attract a greater share of the millions of international visitors who arrive in the UK via the airport each year

Work on the above is already underway through Experience West Sussex, and partners have agreed to work collaboratively through a countywide partnership to maximise the opportunities afforded by a focus on the visit economy. Through the Partnership, the County Council is working with the Districts and Boroughs on a range of initiatives to market the county and to develop the visitor product to ensure a high value visitor offer. These initiatives have the potential to extend the season, reduce the seasonality of employment and grow the visitor economy within West Sussex.

Horsham District Council

HDC is working to a five-year visitor economy strategy (2018-2023). The strategy's aims are threefold:

- 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
- Roots and shoots – business support, events delivery and experience development e.g. walking and cycling trails that include wildlife discovery and local produce
- Curious nature – to celebrate local crafts, skills and to promote stories around local geology, landscape and wildlife

Adur & Worthing Councils (AWC)

AWC are working to a 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

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 - recognising key day visitor groups such as Local residents/Visiting Friends and Relatives; Repeat visitor engagement.
- Convert day visits into overnight stays - positioning the product as 'more than a day' visit across print, digital, social media and PR and working with key product themes to engage the consumer in different ways.
- Attract visitors from a wider catchment area - targeting visitors from South West London for both day visit and overnights and engaging the Travel Trade to encourage domestic and international visits
- Deliver a strong and distinctive brand – building on core product values (Natural, Authentic, Experience, Fun), and developing a Destination Brand that showcases the District's strengths as a whole experience.
- Increase visitors outside peak season – working with key accommodation providers and attractions to showcase out-of-season breaks by targeting key domestic and international segments and reaching potential visitors via 3rd party content partnerships e.g. Expedia.

- Work in partnership to create a healthy visitor economy - developing a strategic partnership framework that enables The Great Sussex Way to support the small/micro-tourism businesses as well as showcasing the core attractions and areas and developing proactive marketing activity working with stakeholders, travel trade and strategic partners to position Chichester as an engaging year-round experience.

Arun District Council (ADC)

ADC's economic development strategy 'Creating Our Future' states 'the visitor economy continues to be a major asset but our plans are about more than tourism' acknowledging that tourism is important while acknowledging the desire to diversify the economic base. It includes several actions relating to the development of the visitor economy. These are to:

- Facilitate a range of public events to increase footfall and visitor numbers
- Build on Arundel's cultural, leisure and town centre amenities to secure its future as a vibrant visitor destination
- Give residents and visitors the choice of walking or cycling through better infrastructure and linking towns, coast and country
- Support our tourism sector and promote Arun as a major visitor destination

ADC has recently commissioned a strategic tourism review which makes 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, watersports) and operationally to 'show the way' in lifting the quality of the visitor experience (public realm, signage, beach management, toilets) and advocate for visitors across the public and private sector.
- A Refreshed Tourism 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.
- 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.

Mid Sussex District Council (MSDC)

MDSC's Economic Development Strategy 2018-2031 presents four priority themes around which its ambition is centred. These are:

- Place
- Premises
- People
- Promotion

Theme two, Premises, shows a commitment to continue to support the Mid Sussex Experience network of high-quality tourist attractions and luxury accommodation.

Theme four, Promotion, recognises a need to maximise the potential for growth in the Mid Sussex visitor economy, making the most of the District's world class natural assets to increase staying visits and visitor spend, and to grow employment in the tourism sector.

MSDC aims to achieve these by:

- Improving transport connectivity into the district (road and rail)
- Supporting the development of hotel and conference facilities to meet the needs of visitors and the business community
- Working with Tourism South East to maximise the benefits of being a "Destination Partner"

Crawley Borough Council (CBC)

Very little is published around tourism by Crawley Borough Council.

Its draft economic recovery plan is currently out for consultation and mentions the design, promotion and commitment to secure investment to develop a new cultural quarter in Crawley, as well as increasing connectivity through an uplift in the quality and range of low carbon transport.

Eastbourne & Lewes Councils

There are no published plans for tourism in Eastbourne or Lewes although there has been significant investment in the Devonshire Quarter in Eastbourne supporting major events.

Coastal West Sussex Partnership (CWS)

Focusing on the strategic issues, the Coastal West Sussex Partnership brings together leaders and senior officers from business, education institutions and the public sector to work collectively on economic issues that affect the coastal area. The Partnership is one of 5 Area Partnerships that works with Coast to Capital Local Enterprise Partnership.

It has four priority areas:

- Priority One - Building Business Confidence
- Priority Two - Improving connectivity and investing in infrastructure
- Priority Three - Improving workforce skills
- Priority Four - Providing homes and employment space

As part of priority one, CWS offers advice to tourism businesses from setting up a new operation, to relocating businesses, or starting a new enterprise.

In 2019, CWS published the Coast West Sussex Profile Report to provide an up-to-date assessment of the coastal West Sussex economy in 2019 and understand its strengths and challenges along with the key drivers and barriers to growth.

In May 2020, the Partnership issued a Covid Impact Assessment Report to help in its preparation of a response to the effects of the pandemic. It found that the region's challenges include a dependence on tourism, high populations of people self-employed in the creative/digital sector, and concentrations of older residents. The impact on young people, particularly those with fewer skills, was highlighted. It urges a collaborative approach to combating the economic impacts of Covid-19.

Greater Brighton Economic Board

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 Destination Management Organisations (as listed by Visit England)

Visit 1066 country – a public and private sector partnership, bringing together Hastings Borough Council, Rother District Council, Wealden District 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.

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.

Visit Brighton - 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 Tourism 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

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

- Around 62 million tourism visits are taken in Sussex annually, generating over £5 billion for the local economy and supporting 74,000 full-time equivalent jobs. This level of economic impact is equivalent to around ten times that of the Isle of Wight, close to two thirds that of Wales, and a third that of Scotland.
- The staying visitor market (UK + overseas) accounts for 11% of all trips and 50% of visitor spend.
- The overseas staying market accounts for just 2% of trips but 19% of visitor spend.
- National trend data shows a fairly flat picture for domestic overnight visits to England in recent years, a slight decline in day visits but steady growth in overseas visits. Sussex has seen slight growth in both domestic overnight and overseas visits over the last five years.
- Average spend per night by domestic overnight visitors to Sussex (£67.19 East[1] and £64.32 West) is close to the England average (£65.32) and higher than in Norfolk and Suffolk. (Norfolk and Suffolk have been chosen because they will be competitors for Sussex, with a coastal/countryside destination offer.
- Average length of stay by domestic overnight visitors is below the England average: 2.5 nights in West Sussex and 2.7 nights in East Sussex, compared to 3 nights in England, 3.9 nights in Norfolk.

[1] Note: all quoted East Sussex values include Brighton & Hove

- Average length of stay by overseas visitors is 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 be contributing to this high length of stay.
- Brighton & Hove accounts for a quarter of the £5.2 billion of economic impact generated by tourists in Sussex. Eastbourne generates 10%, Chichester 9%.
- Rother, Eastbourne, Hastings, Chichester and Brighton & Hove all have a ratio of tourist trips to local resident population of more than 40:1.
- The majority of staying trips to Sussex are for holiday purposes. Districts where holidays account for the highest percentage (70-80%) of their staying trips are Chichester, Arun, Eastbourne, Brighton and mid Sussex. Districts where business trips account for more than 30% of their staying trips are Crawley, Worthing and Hastings.
- Serviced accommodation accounts for the majority of accommodation used although this varies by district. Districts where non-serviced accommodation accounts for more than a quarter of accommodation used are Chichester (close to half of accommodation used), Arun, Rother, Horsham and Hastings.
- Data from ONS's Business Register and Employment Survey (BRES) shows that tourism industry employment accounted for 14% of all industry employment in Sussex, compared to the England average of 11%.

TOURISM VOLUME & VALUE

Sussex attracts approximately 62 million tourism visits annually, generating over £5 billion[2] in economic impact for the local economy and supporting 74,000 full-time equivalent jobs. To provide some context, Sussex's tourism economic impact is around ten times that of the Isle of Wight, close to two

[2] 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.

thirds that of Wales, over half that of Greater Manchester and a third that of Scotland. The staying visitor market accounts for 11% of total tourism trips to Sussex 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. Volume & value figures for 2019 are as follows:

Table 1: Sussex Tourism Volume & Value 2019

	Trips (m)	Nights (m)	Spend (£m)
UK staying visits	5.5	17.7	£1,196
Overseas staying visits	1.5	9.9	£731
Total staying visits	7.0	27.5	£1,927
Day visitors	55.4		£1,949
Total visitors	**62.4**	**27.5**	**£3,877**

Table 2: 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.

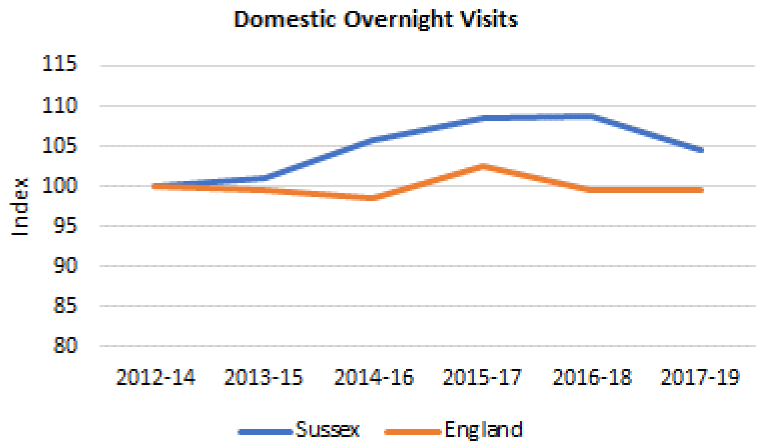
TREND & NATIONAL CONTEXT

The national trend in domestic overnight visits has been relatively flat in recent years. In 2019, British residents took 99.1 million overnight trips in England, with expenditure of £19.4 billion. Over the last decade, the volume of trips has fluctuated around the 100 million level, ranging from 92.6 million in 2014 to 104.5 million in 2012. The tourism day visitor market has seen trip numbers declining slightly in recent years. In 2019, 1.39 billion tourism day visits were taken in England, 8% below the level in 2011 and 11% lower than trip numbers in 2016. By contrast, the inbound market has experienced steady growth, with the number of overseas trips to England up by 36% from 26.5 million in 2009 to 36.1 million in 2019.

The following charts use the Great Britain Tourism Survey (GBTS), the International Passenger Survey (IPS) and the Great Britain Day Visits Survey (GBDVS) to show the recent trend in overnight visits to Sussex[3] (East Sussex and West Sussex combined) and England. 3-year averages are used in order to increase data reliability at a local level. Over the period from 2012-14 to 2017-19, domestic overnight visits to Sussex increased by 4%, whilst in England as a whole, visit numbers fell by 1%. Between 2015 and 2019, overseas visit numbers increased by 9% in Sussex, 11% in England.

The Day Visits chart illustrates the trend in tourism day visit numbers between 2015 and 2019, down by 7% in England and 12% in the South East region.

[3] The Day Visits chart shows the South East region rather than Sussex because consistent trend data for Sussex is unavailable. Following a GBDVS methodology change in 2016, national and regional data has been re-weighted to allow trend analysis but this is not available for counties and districts.


Domestic Overnight Visits
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110
105
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Index
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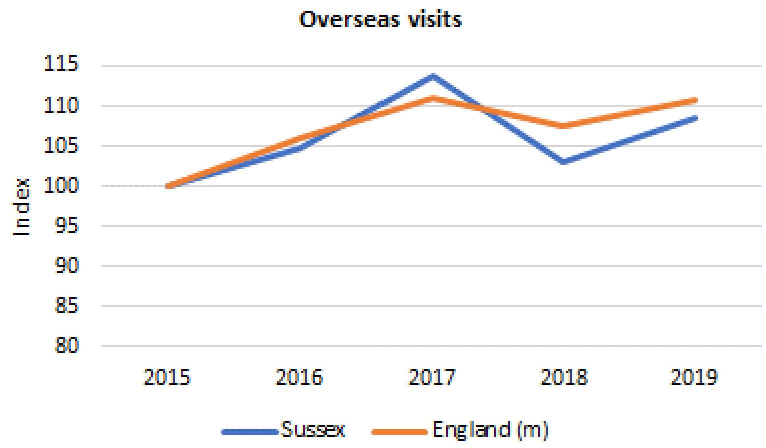
Sussex
England


Overseas visits
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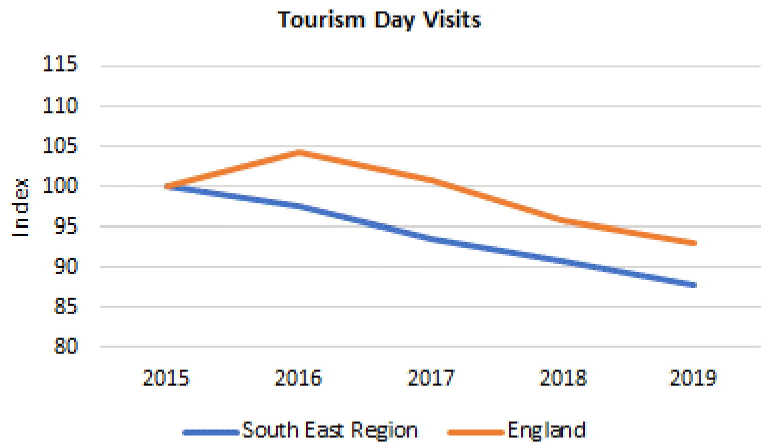
Tourism Day Visits
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Index
2015
2016
2017
2018
2019
South East Region
England

The three national surveys allow useful comparisons to be drawn with other destinations and England as a whole, for average spend and length of stay. Note, the figures are not comparable with those from the Cambridge Model due to different methodologies.

Average spend per day by day visitors to East Sussex and West Sussex is below the England average although higher than in Norfolk and Suffolk. Spend per night for UK staying visitors is close to the England average and higher than in Norfolk and Suffolk. However with relatively short average lengths of stay, average spend per trip is lower. For the overseas market, the high average length of stay in East Sussex (8 nights) results in a high average spend per trip compared to West Sussex, Norfolk and Suffolk, although it is still well below the England average (which includes London).

Table 3: Day Visits: Average Spend

	Day Visits	
	Volume of trips (m)	Ave spend per day
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

Table 4: Staying Visits: Average Spend and Length of Stay

	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

The overseas market is 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 has 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 5: The Overseas Market

	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[4], '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

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

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%).

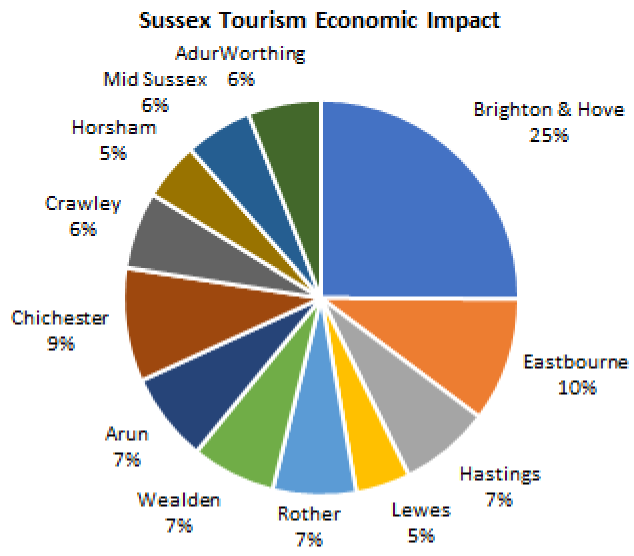
DISTRIBUTION OF VISITS AND IMPACT ACROSS SUSSEX

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 accounts for a quarter of the £5.2 billion of economic impact generated by tourists in Sussex. Eastbourne generates 10%, Chichester 9%.

Table 6: Sussex Tourism: Volume, Value & Economic Impact by District

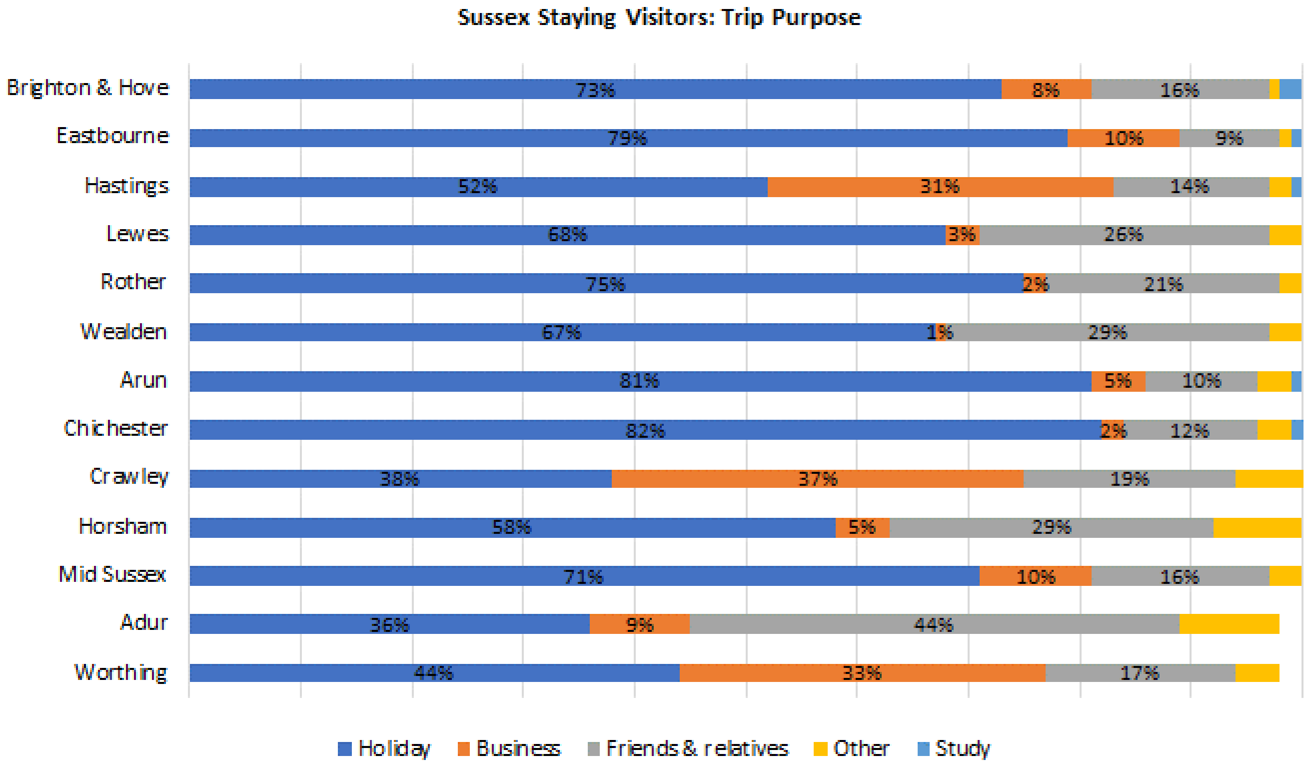
	Population (2019)	Staying Visits (m)	Day Visits (m)	Total Tourism Visits (m)	Tourism Visits per resident	Visitor Spend (£m)	Economic Impact (£m)	Employment (fte)
Brighton & Hove	290,900	1.67	10.70	12.37	43	£976.38	£1,303.22	17,700
Eastbourne	103,700	0.81	4.65	5.46	53	£408.89	£529.73	7,986
Hastings	92,700	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 Tourism Economic Impact
AdurWorthing 6%
Mid Sussex 6%
Horsham 5%
Crawley 6%
Chichester 9%
Arun 7%
Wealden 7%
Rother 7%
Lewes 5%
Hastings 7%
Eastbourne 10%
Brighton & Hove 25%

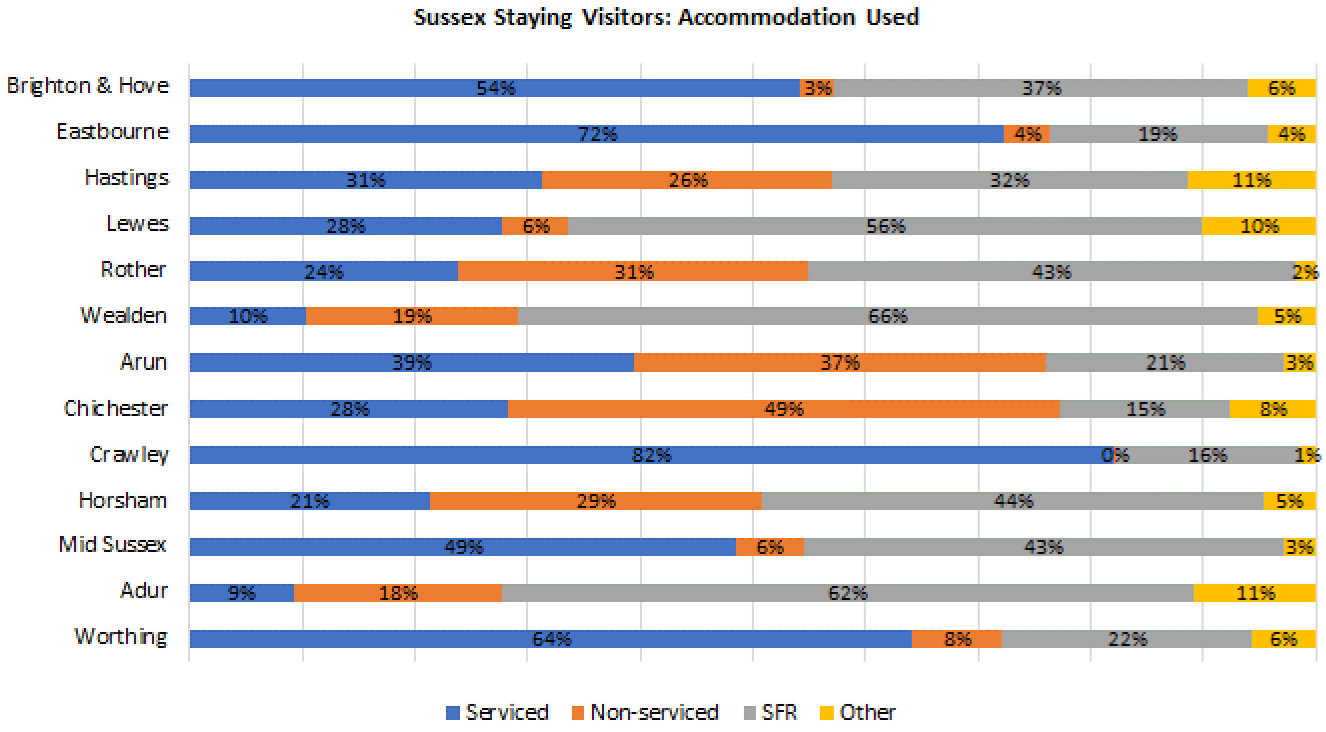
TRIP PURPOSE

The majority of staying trips (domestic and overseas) to Sussex are for holiday purposes. However this varies by district, with 70 - 80% of trips being for holidays in Chichester, Arun, Eastbourne, Brighton and mid Sussex, compared to around 40% in Adur, Crawley and Worthing. The highest percentage of business trips are in Crawley, Worthing and Hastings (around 30-35%). Note: Due to small sample sizes at a local level, this level of detailed analysis should be viewed as broadly indicative of trip purpose rather than a precise measurement.



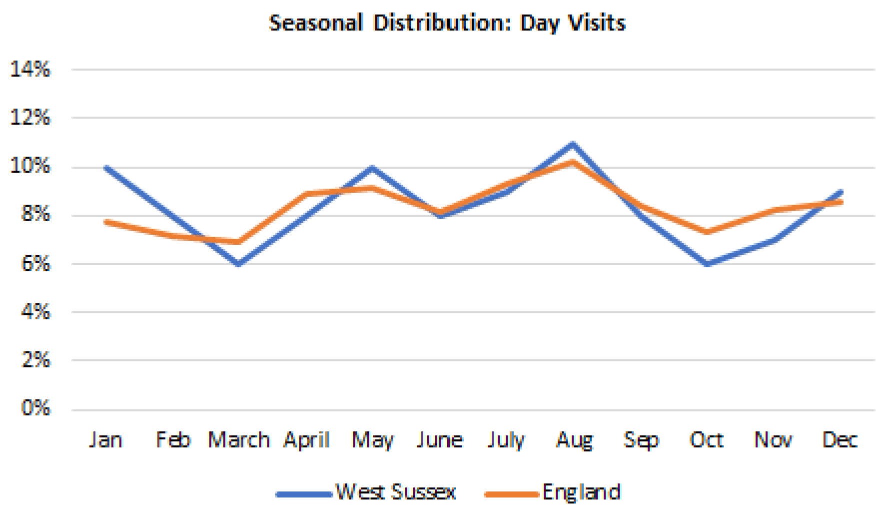
ACCOMMODATION

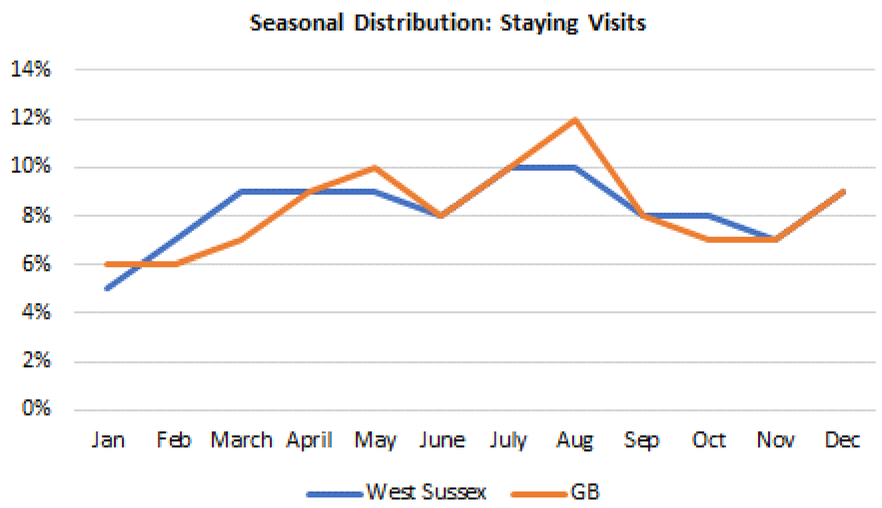
Accommodation used by staying visitors (domestic and overseas) varies by district. Serviced accommodation is particularly dominant (accounting for more than 50%) in Crawley, Eastbourne, Worthing and Brighton. In Chichester, the non-serviced sector is the most used type of accommodation (49%), whilst in Adur and Wealden, staying with friends and relatives accounts for more than 60% of accommodation used.



SEASONALITY

Seasonality data is available for West Sussex only (Economic Impact of Tourism – West Sussex and Districts 2019). Comparing West Sussex monthly figures to national data from the GB Day Visits Survey, GB Tourism Survey and International Passenger Survey, the seasonal pattern looks broadly similar, with peaks in July/August and a low for staying visits in January/February.





Sources: Economic Impact of Tourism – West Sussex and Districts 2019, GB Day Visits Survey 2019, GB Tourism Survey 2019, International Passenger Survey 2019

TOURISM RELATIVE TO OTHER INDUSTRY SECTORS

Whilst the Cambridge model and national tourism surveys are designed specifically to analyse demand and spending by tourists, a look at national employment data is helpful in providing an indication of tourism's importance relative to other industries. ONS's Business Register and Employment

Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry. It is a sample employer survey that records a job at the location of an employee's work place. In 2019, tourism industry employment accounted for 14% of all industry employment in Sussex, compared to the England average of 11%. The definition of 'tourism industry' used here is that used by Visit England and ONS for tourism sector economic analysis. A full list of SIC codes is provided below. Note that tourism industry employment counts all employment within that tourism-defined SIC code. It does not allow differentiation between consumption by tourists and consumption by local residents.

Table 7: Employment in Tourism Industries, 2019

	Tourism industry employment	All industry employment	Tourism Share
East Sussex	25,000	194,000	13%
West Sussex	57,000	404,000	14%
Brighton & Hove	22,000	146,000	15%
Total Sussex	**104,000**	**744,000**	**14%**
England	2,908,000	27,154,000	11%

Source: Business Register and Employment Survey, ONS

TOURISM SIC CODES

Tourism Industries	SIC2007 code	Description
Accommodation for visitors	55100	Hotels and similar accommodation
	55202	Youth hostels
	55300	Recreational vehicle parks, trailer parks & camping grounds
	55201	Holiday centres and villages
	55209	Other holiday and other collective accommodation
	55900	Other accommodation
Food and beverage serving activities	56101	Licensed restaurants
	56102	Unlicensed restaurants and cafes

	56103	Take-away food shops and mobile food stands
	56290	Other food services
	56210	Event Catering Activities
	56301	Licensed clubs
	56302	Public houses and bars
Railway passenger transport	49100	Passenger rail transport, interurban
Road passenger transport	49320	Taxi Operation
	49390	Other passenger land transport
Water passenger transport	50100	Sea and coastal passenger water transport
	50300	Inland passenger water transport
Air passenger transport	51101	Scheduled passenger air transport
	51102	Non-scheduled passenger air transport
Transport equipment rental	77110	Renting & leasing of cars and light motor vehicles
	77341	Renting & leasing of passenger water transport equipment
	77351	Renting & leasing of passenger air transport equipment
Travel agencies & other reservation services activities	79110	Travel agency activities
	79120	Tour operator activities
	79901	Activities of tour guides
	79909	Other reservation service activities n.e.c.
Cultural activities	90010	Performing arts
	90020	Support Activities for the performing arts
	90030	Artistic creation
	90040	Operation of arts facilities
	91020	Museums activities
	91030	Operation of historical sites & buildings & similar attractions

	91040	Botanical & zoological gardens and nature reserves activities
Sporting & recreational activities	92000	Gambling & betting activities
	93110	Operation of sports facilities
	93199	Other sports activities
	93210	Activities of amusement parks and theme parks
	93290	Other amusement and recreation activities nec
	77210	Renting and leasing of recreational and sports goods
Country-specific tourism characteristic activities	82301	Activities of exhibition and fair organisers
	82302	Activities of conference organisers
	68202	Letting and operating of conference and exhibition centres

Source: Office for National Statistics

4. MARKET ANALYSIS

KEY POINTS

- Older couples (55+) travelling without children and from ABC1 socio-economic groups dominate the existing domestic market on the whole but there are some exceptions to that e.g. Bognor and Littlehampton see a higher proportion of families visiting. By contrast, Brighton has little to offer families, attracting mainly younger parties travelling without children.

- Destinations generally attract a local and regional market travelling from the South East (Kent, Surrey, Hampshire) and London but Brighton attracts visitors from further afield – and a significantly higher proportion of visitors from the East Midlands when compared to Great Britain average.

- The majority of existing overseas visitors to Sussex are travelling from Germany, followed by Netherlands, France, USA, and to a lesser extent, Australia. Research by ESCC shows that 30% of overseas visitors are travelling into Dover from Calais and 28% are arriving at Gatwick Airport.

- SDNPA, CWS, BHCC and 1066 Country have recently identified the target markets they are trying to attract. Domestically, these tend to be older couples travelling without children from a relatively local catchment area. However, Brighton is also actively trying to target younger empty-nester families from a 1-4 hours' drive time (including cities with domestic flights to Gatwick). 1066 Country has identified the iGeneration as a potential target market.

- Internationally, near northern-European countries, particularly Germany, have been identified as having the most opportunity for growth, with some opportunity to grow the North American market. However, recent Visit Britain research has shown that, coming out of Covid, Britain is at short-term risk in some of those core/close markets (France, Germany, Irish Republic and Netherlands) due to a diverse safety image and is actually better positioned for long haul markets, Nordics and Southern Europe.

- Looking at short term trends, Sussex has the potential to attract domestic overnight visitors looking for a good value staycation as the country comes out of Covid - it has plenty of open spaces for outdoor activities and with a good urban/rural mix. Brexit implications on overseas travel intentions shouldn't be overlooked and Visit Britain has stressed the importance of informing and reassuring consumers to make sure existing confusion and concerns about conditions for travel to Britain do not act as a barrier to recovery once the time is right for travel again. This will be of particular importance for the English Language Study market across Sussex.

- Longer term, there are opportunities to build on the region's existing visitor base and capitalise on ageing markets, multigenerational travel and wellness trends.

Notes: (i) Most of the market data available is at least 3-4 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.

EXISTING MARKETS

Derived mainly from visitor surveys and 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*	▶ 78% day visitors (89% local – from Surrey, Sussex or Hampshire) ▶ Half of staying visitors from a local or regional catchment (i.e.	▶ Almost 40% are visiting as a couple, increasing to almost 50% amongst staying visitors	▶ Walking (30%) – more popular with staying visitors than day visitors ▶ Visiting an attraction (20%)	▶ Older couples and parties without children form the majority of the domestic overnight market

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
proposition 2018	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)	▶ 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+)	▶ 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 ▶ Ease of getting there also featured	▶ 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 national park for regular local exercise and activities.
East Sussex County Council	▶ Approximately 40% are day visitors from home (Battle significantly lower 23%) – spread	▶ Mosaic Profile A City Prosperity – high earners, city living, no children, 26-35	▶ Day visitor activities undertaken – eating and drinking (27%), walking (14%), general	▶ Local visitor base, even those staying overnight – 'holiday on the doorstep'

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
East Sussex Data Warehouse - GBDVS, GBTS, IPS, Destination Survey (2009-2012), Mosaic groups	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%) ▶ 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	▶ 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 ▶ 51% visiting as a couple ▶ 25% of domestic overnight visitors 65+	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%)	▶ 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	
	▶ Nearly 30% are first time visitors			
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%) ▶ 29% first time visitors to CWS	▶ 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 come back' (50%), presence of beach and water-based activities (41%), Family friendly activities (20%) –	▶ 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. This is supported by the relatively high satisfaction rates even though it's not considered a particularly vibrant area

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
			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%	
BHCC/ VisitBrighton *Brighton Destination Report 2017*	▶ 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 when compared to Great Britain average. ▶ Receives a lot of day visitors (almost twice as many as	▶ Brighton attracts a younger audience than other destinations in GB with significantly more 18-24, 35-44 and 45-54 year olds and with older people less likely to visit.	▶ Relatively low satisfaction scores which hinders repeat visits (though these had improved in a 2018 study) ▶ Among domestic holiday makers Brighton is known for its unique,	▶ Visitors staying in Brighton are more likely to travel further than to other parts of Sussex. ▶ Appeals to younger visitors ▶ Perhaps doesn't live up to its reputation and so lower repeat visits

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
Brighton Visitor Survey 2018	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		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	
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 ▶ 1% business ▶ 33% first time visitors	▶ 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, art and culture, base for walking/rambling	▶ 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 Language Schools in the Hastings area

Organisation and source docs	Existing visitors			Commentary/insights
	Trip type -Day/Staying/overseas – and frequency	Characteristics/Segment/Profile	Motivations to Visit	
	▶ 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		▶ 98% of visitors ranked the enjoyment of their trip as high or very high	

POTENTIAL MARKETS

Some of the organisations across the Sussex region have already identified target or potential markets. These are shown in the table below.

Organisation & source doc	Target markets/Potential markets	Commentary/Insights/Notes
SDNPA *Customer Segmentation and Market*	**Regional Actives (Active Adults)** - couples; mainly 50+, ABC1s with a reasonable disposal income. This segment is looking for relaxation, and peace and quiet in a countryside environment. A key element of the trip will be an outdoor activity. However, the experience is likely to be more than this with an emphasis on the wider destination offer. Especially true for staying visitors.	▶ Is there an opportunity to provide a Sussex base for those affluent older couples visiting the national park and

Organisation & source doc	Target markets/Potential markets	Commentary/Insights/Notes
proposition 2018	**German Active Explorers** - booking through the travel trade – either organised tours or Fully Independent Travellers (FIT) - couples (travelling without children), typically 45-60, ABC1s. They will be healthy and active, enjoy walking and hiking, and spending time outdoors but will also be interested in seeing the sights and experiencing local culture. They will typically be first time visitors to the South Downs but will have visited the UK before. They will be looking for gentle adventure and walking, iconic sites and views and possibly parks and gardens. Food will be part of the experience but not a driver. This is not necessarily a London Plus market and it could be seeking a South West Plus concept with South Downs as the trip start/end point. (N.B. this was driven by the tactical delivery of a DEF project and generally the overseas markets are relatively low scoring segments)	looking for a wider destination offer?
CWS *Coastal West Sussex Tourism Report 2016*	Postcode data collected from various visitor enquiry databases showed that 3 MOSAIC profile groups stand out as being potential visitors for CWS: **MOSAIC Profile B – Prestige Positions** **MOSAIC Profile C – Country Living** **MOSAIC Profile D – Domestic Success** Geographically from a short-break catchment area, particularly **London-based** and those in **near European countries and North America**	
BHCC/ VisitBrighton	**Urban dwellers** who are active and frequent break takers, with an optimistic and socially liberal outlook. They are likely to be relatively time-poor, media-literate, brand-conscious, trend sensitive and culturally aware. They will have above average disposable income. Urban	▶ Despite Brighton's existing visitors being younger, the city is

Organisation & source doc	Target markets/Potential markets	Commentary/Insights/Notes
Brighton & Hove Visitor Economy Strategy 2018-2023	dwellers are more likely to use public transport – an important consideration for the city both practically and ideologically. They also have a higher tolerance for the more negative aspects of urban life – e.g. litter, graffiti, traffic, crowds, begging, drunkenness, noisy nights etc The age profile is older **55+,** particularly for off-peak growth given the ageing population trend (both UK and international) and the city's current younger visitor profile. **Pre-family, childfree and empty nesters** are also worth targeting as they are more likely to travel outside school holidays. Geographically located in urban areas within **1 to 4 hours' travel time** of Brighton (could include cities with domestic flights into Gatwick.) People living within 60 minutes are much more likely to see Brighton as a day-trip destination. Internationally, cities with direct routes into Gatwick and/or repeat visitors to GB wanting to travel beyond the honeypots. On business tourism, there is a focus on **conference markets in Digital, Life Sciences, Advanced Engineering and Creative Sectors -** a clear strength for the city that brings staying visitors outside the summer months and during weekdays. A huge potential market on Brighton's doorstep has also been flagged as London-based corporates, positioning the city as a place for product launches, sales conferences and team-building.	targeting an older age profile to drive off peak growth. ▶ Is there a marketing opportunity for Sussex to target cities with direct routes into Gatwick?
1066 Country	There is an opportunity for 1066 country to attract more of the existing segments: Families from the following MOSAIC segments (day trippers and staying visitors):	▶ The perceived negative impact of Brexit on ease and cost of study may

Organisation & source doc	Target markets/Potential markets	Commentary/Insights/Notes
1066 Country Marketing Strategy 2016 - 2025	▶ MOSAIC Profile D - Domestic Success ▶ MOSAIC Profile H - Aspiring Homemakers ▶ MOSAIC Profile B - Prestige Positions Empty Nester Cultural Explorers from the following MOSAIC segments (daytrippers and staying visitors): ▶ MOSAIC Profile B - Prestige Positions ▶ MOSAIC profile C - Country Living A growth opportunity is also identified in the iGeneration from the following MOSAIC segments: ▶ MOSAIC Group O - Rental Hubs ▶ MOSAIC Group H - Aspiring Homemakers Geographically from Kent, Sussex, Surrey, South/SE London. More international visitors from existing countries: ▶ France ▶ Germany ▶ Netherlands ▶ Belgium English Foreign Language Students	have an impact on the level of opportunity that the English Language Schools present for growth in overseas visitors.

MARKET TRENDS - THE BIG PICTURE

Tourism generates £106bn a year in England and employs 2m people. No wonder that VisitBritain's latest 5-year strategy is to 'make tourism one of the most successful and productive sectors for the UK economy'.

But competition is fierce. Internationally the number of new and emerging destinations continues to expand. While domestically, the range, scale and quality of UK destinations continuously improves with new investment in accommodation, attractions, experiences, culture and heritage.

Consider the offer for visitors and the level of competition becomes apparent. In the UK there are:

- 927 towns or cities of more than 10,000 people
- 15 National Parks (Britain)
- 46 Areas of Outstanding Natural Beauty (Britain)
- 7723 miles of coastline
- 1600 museums
- 196 Castles and Historic Properties (England)
- 45,000 hotels

In such a competitive marketplace and with such choice available to prospective visitors it is important for destination marketers to understand that people don't make destination decisions based wholly on the practical information available to them. Rather they first decide how they want to *feel* during their break – and then consider a sub-set of destinations they are aware of that will make them feel that way. Their subsequent research is to give them confidence in their choice. In its 2017 report Places that make us[5], the National Trust cites research which demonstrates just how strong physical and emotional connections between places and people can be - and that visiting meaningful places can have a positive effect on our wellbeing.

[5] Places that Make us, National Trust, 2017

Coming out of covid

The travel industry has suffered enormously as a result of the global pandemic – in February 2021 the Office for National Statistics published data that showed air transport turnover fell 89% year on year to December 2020, travel agent and tour operator turnover fell by 86%, and accommodation turnover was down 73%. It found that travel and tourism-related sectors comprised eight of the 10 most-impacted by Covid-19. The only other sectors suffering contractions of a similar magnitude were rail transport (-64%) and domestic work (-51%).

There is no up to date information about the impact of Covid on the regional tourism sector but in August 2020 Tourism South East reported that just over a third of businesses in the region (36%) anticipated losing more than £100,000 of revenue due to COVID-19. The types of businesses anticipating the highest losses were theatres, conference venues, events, bars and restaurants.[6]

However, with vaccines being rolled out, there is some optimism for the tourism industry in 2021 and beyond.

VisitBritain's most recent consumer research (March 2021) shows that the number of people who believe 'the worst has now past' has risen to 40%, the third consecutive wave of research within which it has increased significantly. People are beginning to feel 'more confident' of overnight travel within the UK from April 2021 onwards and over 30% feeling 'very confident' about being able to take an overnight UK break from October 2021.[7]

The March wave of the BVA-BDRC Clearsight Recovery Tracker also shows an update on the mood of UK consumers, with a further period of significant improvement in the level of comfort with the idea of re-engaging with public transport, travel, hospitality, leisure and retail.[8]

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[6] Tourism South East Covid-19 Business Impact Survey – Aug 2020

[7] VisitBritain Consumer weekly tracker wave 26

[8] BVA-BDRC Clearsight Report on recovery from Covid-19

The National Coastal Tourism Academy is predicting a 39% increase in tourism spend in 2021 compared to 2020 (although this is a £5.23bn loss vs pre-Covid-19 levels).[9]

Internationally, Visit Britain research shows that the desire to travel remains strong particularly from couples but many have not made up their minds on where they wish to go yet and so competition for destinations is high. When they can travel, travellers will be looking for less crowded places in the short term. It shows that, coming out of Covid, Britain is well positioned for long haul markets, Nordics and Southern Europe but at short-term risk in some core/close markets (France, Germany, Irish republic and Netherlands) due to a diverse safety image.

The OECD states that 'domestic tourism is expected to recover more quickly and offers the chance for driving recovery'.

However, the landscape has changed and people have changed their perceptions of travel. In the short term, the post Covid tourism landscape will be influenced by the following factors:

- Importance of safety and hygiene measures in all elements of the visitor experience
- Demand likely to be greater for socially distanced – spacious destinations. Rural areas, destinations with open/car-free public space, for outdoor activities and attractions, and for self-catered accommodation
- Faster recovery in demand from families and those visiting friends and relatives
- Marketing messages need to respond to evolving market concerns over next few years – not enough to say 'come now'
- Constraints on budgets and holiday time mean travellers want to find out as much as possible about their destination before getting there
- Prevailing interest in staycations and trips close to home
- Reassurance that there is enough and of the right type of things to do
- Ease of booking either before or during the trip; clarity on terms and conditions, cancellations etc
- Visit Scotland summed up "convenience, reassurance, value, inspiration and connection" are the new consumer drivers.

[9] NCTA Impact of Covid-19 on Coastal Tourism Feb 2021

Post Brexit

In March 2021, Visit Britain concluded its five-year tracking project on EU exit sentiment. Key findings from the final wave of research show that:

- Most travellers feel their likelihood to visit Britain has not been affected by the EU referendum decision and subsequent exit from the EU. While the balance remains positive on the overall international level, it is more negative in Europe with many Europeans confused about the conditions for travel to Britain following the exit from the EU and end of the transition period.
- Levels of concern show that still round about half of international respondents are concerned they might encounter higher costs for travel insurance and for access to mobile data, difficulty to claim compensation in case of cancellation, and longer queues on entry to Britain. More than half of Europeans are worried that it could be more expensive to take their shopping back home after a stay in Britain. Almost as many Chinese and US respondents are concerned it might be more difficult to include Britain on a multi-country trip.
- Most travellers continue to see Britain as a destination which is welcoming to visitors, open-minded and tolerant.

In light of these findings, the report stresses the importance of informing and reassuring consumers to make sure existing confusion and concerns about conditions for travel to Britain do not act as a barrier to recovery once the time is right for travel again. This is of particular importance for the English Language Study market in 1066 country.

Other Trends

In addition to the short-term factors above, other global trends in tourism, are also worth considering as these will influence travel patterns in the longer term:

Staycations - This trend looks set to continue for the rest of 2021 as international travel remains banned until 30 June. Even from June, many travellers are likely to fear foreign holidays and plane travel, preferring instead to book themselves into some coastal or countryside accommodation in the UK. Bookings for UK accommodation are already soaring for Summer 2021. The Rest Easy Group, a company in charge of two of the biggest holiday booking sites, Snaptrip and LateRooms.com, reported that 95 per cent of inventory has been sold in popular areas like Devon and Cornwall during July and August.[10]

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%[11] 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.

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.

Wellness - Wellness is an increasingly large and mainstream aspect of global tourism believed to account for around 14%[12] of all tourism expenditure ($563bn) and faster growing than all tourism at 14% (2013-2015) compared to all tourism growth of 6.9%. While there is a core of visitors who seek and take wellness dominated break, the majority (84%) integrate wellness into their mainstream breaks. The research also highlights the importance of the natural environment when taking a wellness break. 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

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[10] The iNews - https://inews.co.uk/inews-lifestyle/travel/travel-ban-extended-uk-holiday-bookings-fine-overseas-explained-restrictions-abroad-925912
[11] Tourism Trends and Ageing. Eurostats. 2016
[12] Global Wellness Institute

Authenticity and pursuit of the real - Visitors want to connect with a place and its people. 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[13] 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. So, when we get it right, the visitors will do our marketing job for us. People are seeking experiences that combine fun /learning/self-improvement/well-being. They want local food, drink, crafts offered through independent businesses rather than chains.

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.

Sustainable and green 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. According to Booking.com's Sustainable Travel Report for 2020[14], 72% of global travellers have identified sustainable travel as being important to them, while 55% say they are looking to make more sustainable choices once they can travel again.

Technology trends - Social media is increasingly prominent in travel marketing with the public driving content creation. Video is the new currency for storytelling and Destination Management Organisations can only control their own content or channels; not content that is user generated. 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.

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

[14] https://partner.booking.com/en-gb/click-magazine/sustainable-tourism-becomes-priority-72-global-travellers

Glampervan, road trips and solo travel - A trend for 2021 is hiring or owning a camper van. These are then upgraded to provide a moving 'glamping experience'. They are popular as they offer everything you need, neatly packed around you, self-sufficiency and the freedom to travel in your own literal bubble[15].

Flexible booking policies - Of course, with cancellation being rife over the past year, many travellers are also looking towards flexible booking policies and free cancellations. While most trips will be covered under travel insurance, it looks likely that people will lean towards hotels and packages with more accommodating cancellation policies to save the hassle of chasing up lost funds from insurers. Airlines are scrapping some of their 'flight change' fees whilst hotel chains are allowing no-charge cancellations up to 24-hours prior to travel.

Last minute bookings - Whilst there is more flexibility being offered, it is likely that people will make last minute decisions about travel if they see a window of opportunity.

'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.

Budget vs Extravagance - Both ends of the scale seem relevant in travel trends for 2021 onwards - some who have endured hardship will be looking for maximum value from travel, whilst others who haven't been able to spend, are looking for very high value experiences such as hiring private islands and jets.

Outdoor activity - One activity that grew significantly during 2020 was cycling. There are various statistics to support this including the UK Transport Secretary indicating that cycling has increased by as much as 200% and Cycling Scotland indicating a 43% increase on the same period last year[16], and the

[15] https://www.campinginbritain.co.uk/camping-news/2020-was-the-year-of-the-campervan-but-could-2021-be-even-busier-as-people-see-now-see-them-as-the-safe-way-to-travel/
[16] https://www.cycling.scot/news-and-blog/article/six-month-stats-see-cycling-up-43-in-scotland

sales of bikes and e-bikes are also up. 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[17]. 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.

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

4. 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 High Weald Area of Outstanding Natural Beauty is a medieval landscape of wooded, rolling hills, stretching from Hastings to East Grinstead. 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.

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. These ‘signature experiences’, with their associated ‘star’ products are:

- Brighton – Brighton Pier, the Lanes, Brighton Pavilion, Brighton Beach
- 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
- 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

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

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.

Similar activities/products will certainly be available in other destinations, but 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.

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 8: Sussex Star Products

Signature Experience	Star Products	Location	Description	Meets Selection Criteria?
Brighton	Brighton Pier	Brighton	Grade II Listed pleasure pier. 4.9m visitors per year.	No. 5, Visit England's Most Visited Free Attractions in England; No.1, Visit England's Most Visited Free Attractions in South East Region.
	The Lanes	Brighton	Historic quarter with narrow, twisting lanes, independent shops, crafts, cafes, pubs, restaurants	No.2, Trip Advisor's Top Attractions in East Sussex; No. 14, Trip Advisor's Top

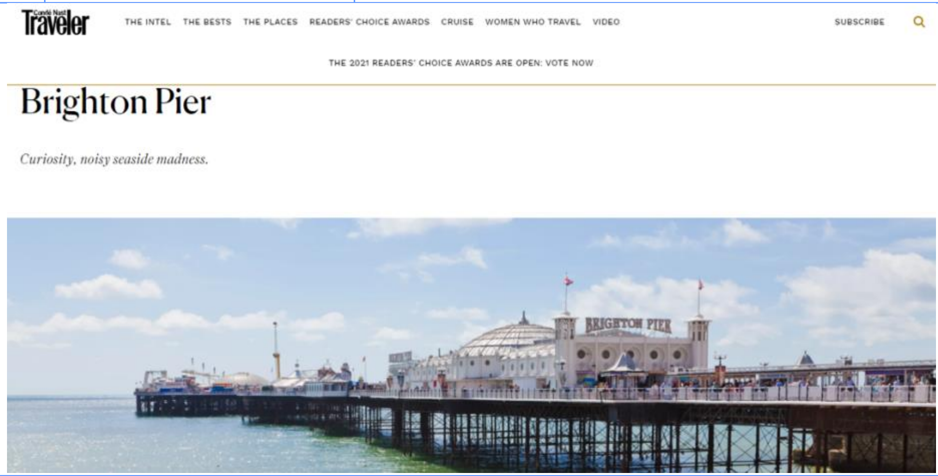
				Attractions in South East England.
	Royal Pavilion	Brighton	Grade I Listed. Built as a seaside pleasure palace for King George IV. 300,000 visitors per year.	No.17, Visit England's Most Visited Paid Attractions in South East Region; No.2, Trip Advisor's Top Attractions in South East England.
	Brighton Beach	Brighton	Brighton’s beach.	No.6, Trip Advisor's Top Attractions in East Sussex; No.31, Trip Advisor's Top Attractions in South East England.

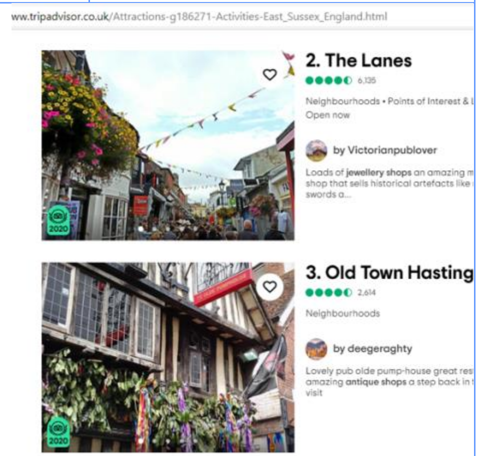

VisitEngland

Most visited free attractions – 201
(1/2)

Rank	Name of Attraction	Category	2018 Visitors
1	British Museum	Museum and /or Art Gallery	5,828,552
2	Tate Modern	Museum and /or Art Gallery	5,868,562
3	The National Gallery	Museum and /or Art Gallery	5,735,831
4	Natural History Museum (South Kensington)	Museum and /or Art Gallery	5,226,320
5	Brighton Pier	Other	4,890,680
6	V&A South Kensington	Museum and /or Art Gallery	3,967,566
7	Science Museum	Museum and /or Art Gallery	3,174,963
8	Somerset House	Museum and /or Art Gallery	3,143,626
9	Tate Britain	Museum and /or Art Gallery	1,272,523
10	National Portrait Gallery, London	Museum and /or Art Gallery	1,586,451

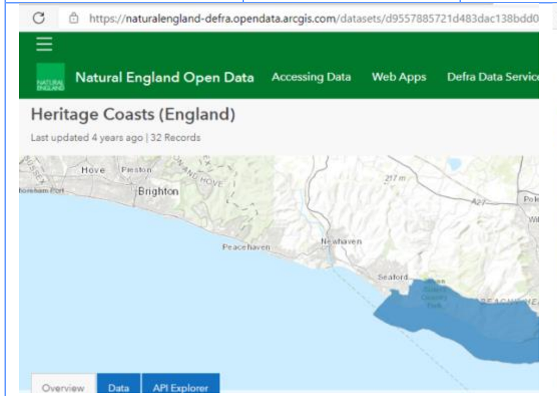
Note: Some Parks excluded as numbers may include visitors to the park only.
E = Estimate





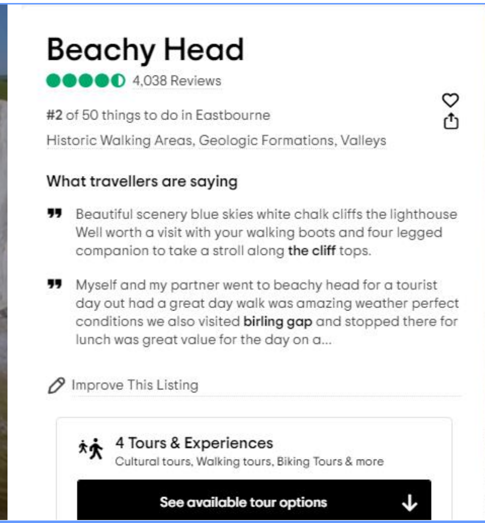
Sussex Coast	Beachy Head	Eastbourne	Highest chalk sea cliff in Britain. Famous beauty spot.	AONB; No.4, Trip Advisor's Top Attractions in East

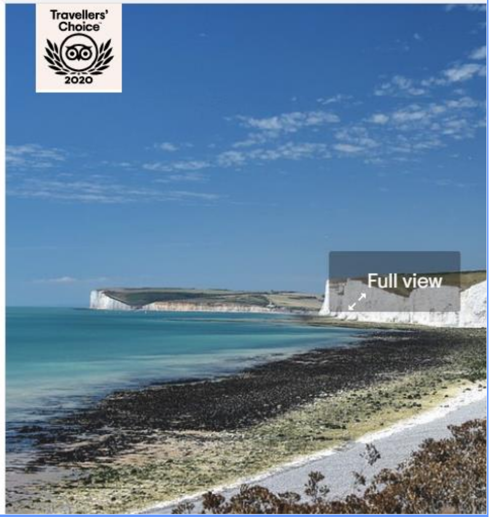
				Sussex; No.16, Trip Advisor's Top Attractions in South East England.
	Seven Sisters	Seaford – Eastbourne	Stretch of coastline with dramatic chalk cliffs. On South Downs Way.	Heritage Coast designation (Natural England)
	Camber Sands	Camber, Rye	5 miles of sandy beach & dunes.	No.1 in Time Out's Best 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

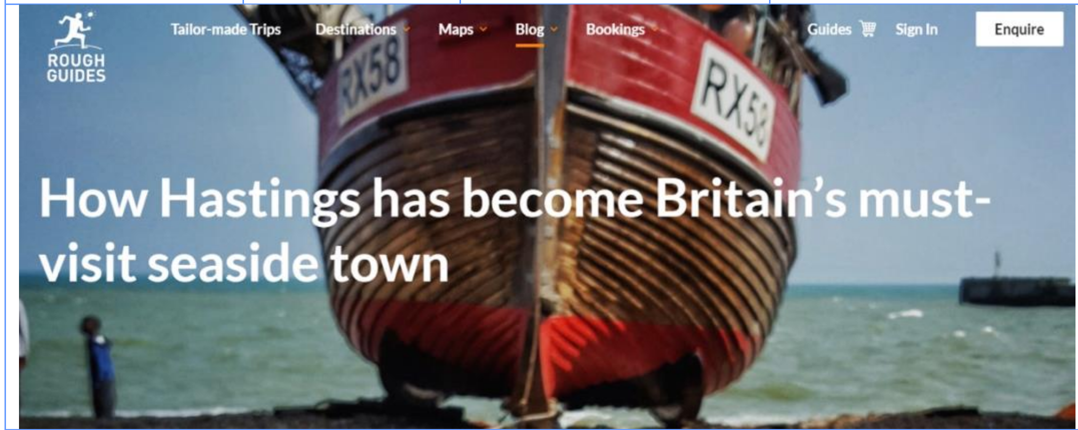
	Devil's Dyke	South Downs	V-shaped valley. Famous, National Trust beauty spot. Part of an SSSI.	National Trust; SSSI





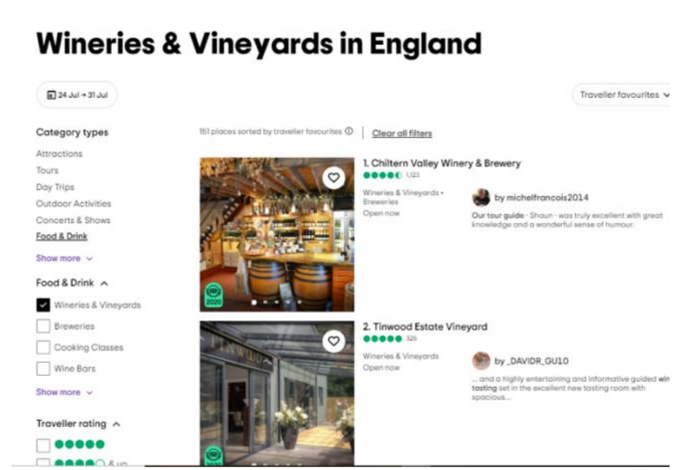
Sussex Historical Towns	Hastings Old Town	Hastings	Historic town. One of the medieval Cinque Ports.	No. 3, Trips Advisor's Top Attractions in East Sussex; Battle of Hastings internationally known.
	Battle	Battle	Historic town. Site of 1066 Battle of Hastings.	Battle of Hastings internationally known.
	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.

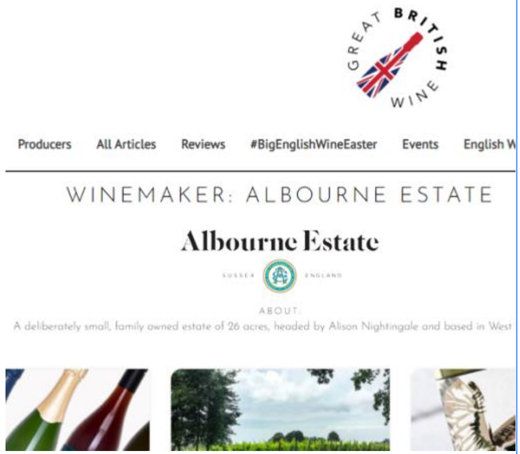


Sussex Vineyards	Tinwood Estate Vineyard	Chichester	Vineyard with tours, tasting room and 3 luxury lodges.	No. 2, Trip Advisor's Wineries and Vineyards in the UK.
	Albourne Estate	Albourne	Vineyard with tours and tastings.	No. 12, Trip Advisor's Wineries and Vineyards in South East England.
	Bolney Wine Estate	Haywards Heath	Vineyard with shop, café, tours, tastings.	No. 17, Trip Advisor's Wineries and Vineyards in South East England.

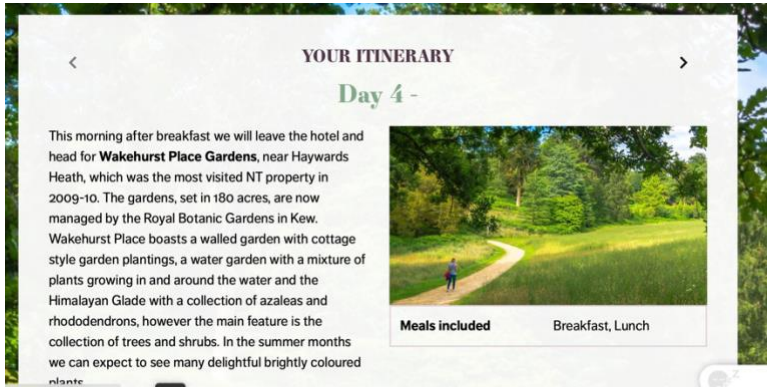
	Rathfinny Wine Estate	Polegate	Vineyard with tours, tasting room & restaurant, trail, gift shop, heritage centre, barn accommodation with 10 rooms, conference facilities.	RIBA nominated winery. Will develop to become one of the largest single vineyards in England and one of the largest in Europe.



Bolney Wine Estate Vineyard, Haywards Heath, Sussex (Photo: Amber Dyer)

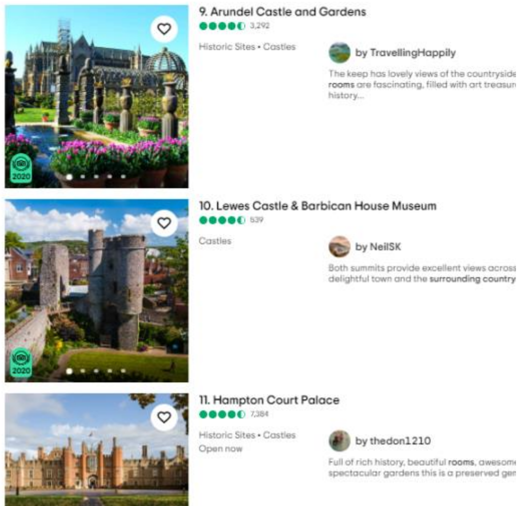


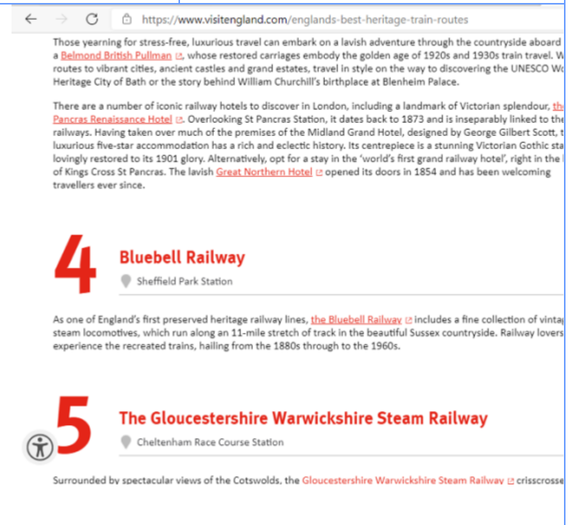
Sussex Gardens	Nymans	Handcross, Haywards Heath	National Trust Garden, Grade II Listed. C. 380,000 visitors annually.	No.12, Visit England's Most Visited Paid Attractions South East Region
	Wakehurst	Ardingly, Haywards Heath	Elizabethan Mansion and wild botanic garden. Owned by National Trust, managed by Royal Botanic Gardens, Kew. C.300,000 visitors annually.	No. 16, 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. 18, Visit England 's Most Visited Paid Attractions South East Region.



Heritage Attractions	Arundel Castle & Gardens	Arundel	Stately Home & fortified castle	No. 9, 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.

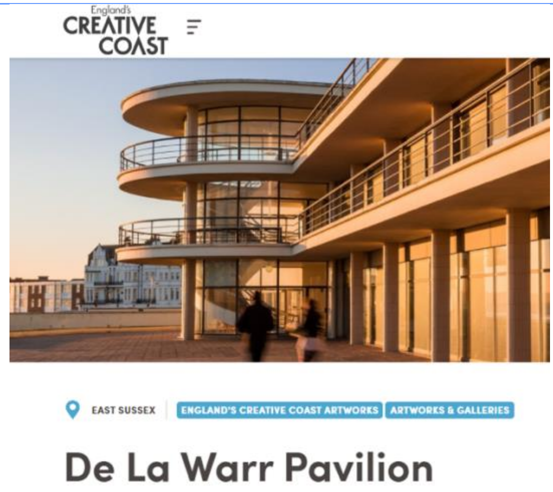
	Fishbourne Roman Palace	Fishbourne	Archaeological museum. First Century site and largest residential Roman building discovered in Britain.	No. 1, Trip Advisor's Top Attractions in West Sussex; No. 23, Trip Advisor's Top Attractions in South East England; special interest Archaeology.
	Bluebell Railway	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.	No 18, Trip Advisor's Things to Do in East Sussex.
	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.
- 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.

https://www.rushfields.com/farm-shop

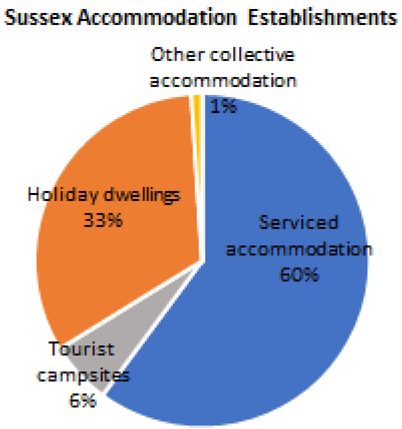
Food & Drink

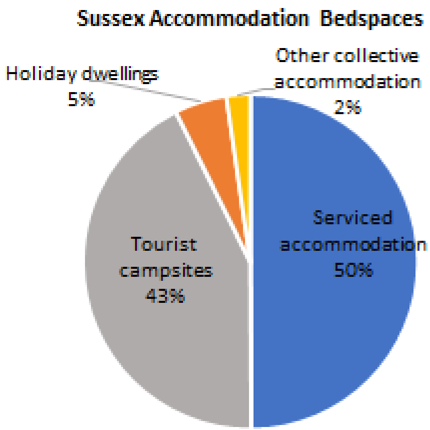
The Sussex food & drink offer is a further notable feature and includes an impressive array of vineyards, breweries, local markets, artisan shops, restaurants, cafes, pubs and food festivals. Food production is an important part of the Sussex economy and local producers are increasingly offering high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

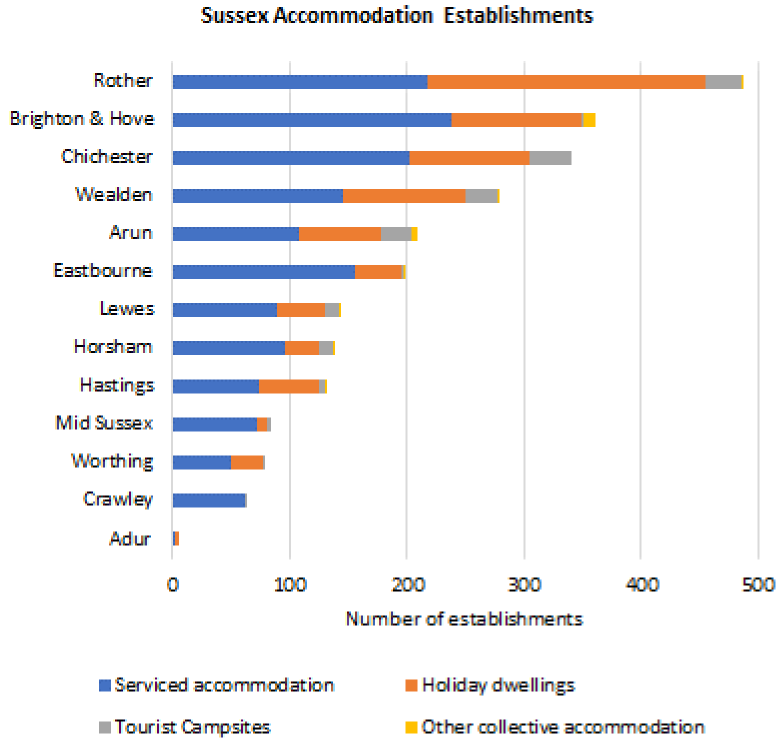
- Producers and markets such as Dark Star Brewing, Arundel Brewery, Harveys and Long Man, Middle Farm, Fish, Lewes Farmers Market, Rushfields Farm Shop
- Restaurants and Inns such as Jeremy's, Gravetye, Tristans, The Pass, Gingerman, Earl of March and Fig Tree
- Independent casual dining such as The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

VISITOR ACCOMMODATION

The analysis of economic impact data in Section 3 found that approximately half of overnight visitors to Sussex stayed in serviced accommodation, a third stayed with friends/relatives and close to a fifth stayed in self-catering 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 five 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 261 hotels for Sussex, of which 196 have star ratings. Of these, 6% are five star, 38% four star, 52% three star and 4% two star. The 65 unrated properties include many of high quality, with around a third rated 'superb'.

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 9: 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
Jurys Inn 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 10: 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.

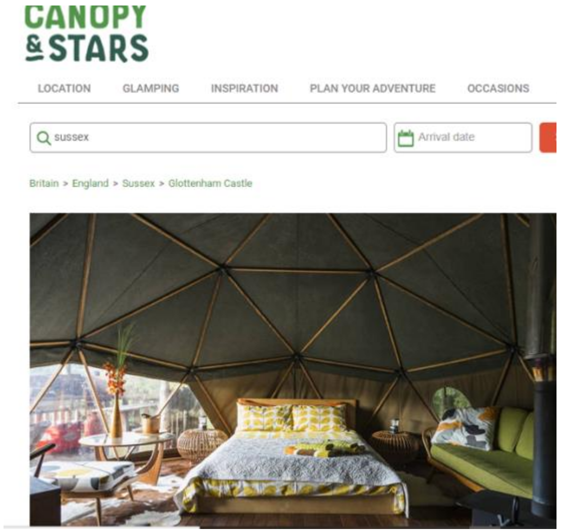
Source: Blue Sail online research

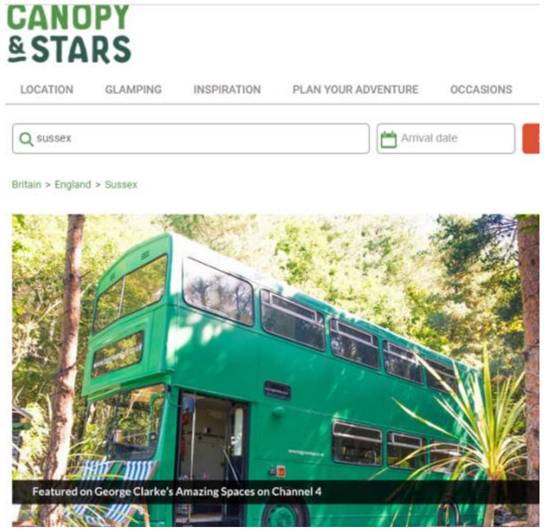
Notable Glamping

Pitchup.com lists 10 camping sites in East Sussex, 2 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 32 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.

The **Higgledy Tree House** was featured on George Clarke's Channel 4 Amazing Spaces programme. He said: "I've never seen a treehouse like it, the whole space is just magical. A stunning handmade fairy tale castle up in the sky with amazing timber work."

The Higgledy Tree House was featured on George Clarke's Channel 4 show Amazing Spaces





AirBnb

AirDNA (provider of short-term rental data for Airbnb and Vrbo) reports 4,290 'entire home' active rentals for Sussex and 1,183 private rooms. A third of properties are available full time. Data for East Sussex and West Sussex is provided below:

Table 11: AirDNA data

	East Sussex	West Sussex
Entire home	2,379	1,911
Private room	528	655
Shared room	2	1
Total active rentals	**2,909**	**2,567**
Entire home rentals as percentage of total active rentals	82%	74%
% available full time	33%	32%
Average rental size (bedrooms)	2.2	2.2
Average rental size (guests)	5.1	4.8
Airbnb ratings (% at least 4.5 overall)	90%	94%
Average daily rate	£120	£122

Source: AirDNA

BUSINESS TOURISM

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

Table 12: Sussex Staying Business Trips, 2019

Destination	Number of business trips	Proportion of total staying trips
Brighton & Hove	134,000	8%
Eastbourne	78,000	10%

Hastings	161,000	31%
Lewes	12,000	3%
Rother	10,000	2%
Wealden	5,000	1%
Arun	31,000	5%
Chichester	14,000	2%
Crawley	172,000	37%
Horsham	12,000	5%
Mid Sussex	38,000	10%
Adur	6,000	9%
Worthing	104,000	33%
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).

Visit Brighton 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. The Right Solution report commented that: *'The fabric, style and standard of the Brighton Centre are not comparable with more recently developed centres in competitive conference destinations.'*

The main venues with largest capacities are:

Table 13: 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 14: Eastbourne Conference Venues

Venue	Capacity (theatre style)
Congress Theatre Auditorium	1,655
Welcome Building	988
Devonshire Park Theatre Auditorium	857
Winter Garden	1,000 *(Closed for refurbishment)*
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.

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) and the City Coast Centre, Portslade (capacity 350). Other sporting venues also exist as meeting venues (Plumpton, Brighton and Fontwell.

5. COMPETITORS, COMPARISONS AND CONSULTEES

KEY POINTS

Unsurprisingly, there is no cookie cutter model for the perfect tourism partnership. The motivators for collaboration and the form that collaboration takes varies widely. However, while the four models set out below illustrate very different solutions on how working together can be structured, they share some common themes:

- Getting public sector partners to collaborate may be complex and nuanced because of local politics and nearly always requires some compromise – therefore the prize has to be well defined and worth the effort. Access to more funding, a stronger impact in the marketplace and more leverage – political and marketing – are all important motivators.
- External factors, including Covid, are driving a move towards bigger tourism partnership territories.
- Travel trade, conference and business tourism, membership, thematic promotions, and international marketing are all fruitful areas for collaboration where selling the shared benefits to public and private sector partners are clear.
- A larger DMO often takes a lead role and/or represents the tourism sector and its businesses on bigger programmes and partnerships than span significant territories.
- There are limited examples of collaboration on tourism management and 'bricks and mortar' development, in part because these are traditionally local authority functions. Will this change as Combined Authorities become more established? It could be an interesting area for further consideration.
- Strong regional partnerships create opportunities for strong meaningful relationships with regional industry players through offering a regional company a single membership, e.g. hotel chain, a brewery. These companies may not join or work with smaller more local DMOs, and certainly don't want to work with multiple DMOs across a territory which they would regard as relatively small. They bring status, match funding and branding opportunities to a regional tourism partnership.

All of the four comparators are successful in their own right and each shine in particular areas. Three of them are about pooling budgets, staff and resources. It is only Visit Kent that has taken a radically different approach, which is to work with others while retaining a lead role in the relationship and a distinct and separate identity. Visit Kent offers services to other destinations, e.g. research; runs other DMOs as a contract, e.g. Hertfordshire; and acts as the lead destination partner for Visit Britain and previously EU bids for programmes that are wider than Kent.

A new approach, just launched, is Visit Gloucestershire partnership. Visit Gloucestershire | Gloucestershire's Destination Management Organisation (visit-gloucestershire.uk). The County has established a Strategic Management Organisation that aims to bring businesses together to share best practice and facilitate collaboration. The SMO will be responsible for optimising the value of the visitor economy which is strongly connected to place and to people. DMOs within the County, where they exist, will continue to be responsible for marketing and promotion and tourism business support, while more local destination organisations will deliver more local welcome activities. It will be interesting to see over the coming months how this model works in practice.

The Great South West Tourism Partnership (GSWTP) was set up because the region lacked a single voice for tourism and there are gaps on the organisational support map. The GSWTP is formed of organisations from a range of backgrounds including commercial and not-for-profit business, local authorities and business improvement districts across Devon, Cornwall, Somerset and Dorset, including Visit Exeter, Visit Cornwall, the South West Tourism Alliance and Visit Devon. The group started with research, gathering a strong evidence base of the performance of tourism to make a case for tourism across the South West and to demonstrate ROI on investment. The group have looked at Tourism Zones and have aligned around zero carbon objectives, digital investment (connectivity, training etc) and seasonality. They achieved funding for a Business Plan and are now developing a £10 million funding strategy to deliver that plan. The Partnership drew on the approach partners had used for delivering INTERREG projects, namely to agree accountable partners and work programmes and then to get local DMOs to bid for delivery on behalf of others and/or to identify specialist delivery/consultancy partners where needed e.g. on zero carbon initiatives. They have fed the model to DCMS as a model for pan regional working at a high level that allows individual DMOs to continue their work productively at a more local level. The approach is supported by LEPs in the South West.

The tables which follow, capture the detail of the comparator research for each of the four places selected.

East of England		Learning for Sussex
Why Chosen	Norfolk, Suffolk, Essex and Cambridgeshire are all competitors for Sussex. Visitor facing competitor – geography and offer. Insight into organisational structures and delivery. Combination of coast and countryside. Drawing on a similar catchment to Sussex. Norfolk and Suffolk have become go-to destinations and alternatives to Cornwall. within certain visitor markets.	
Destination Context	**Local authorities:** counties of Norfolk, Suffolk, Essex and Cambridgeshire. **Size:** approximately 16,000 km^2 **Population:** 3.8 million. **Distinct features/products**: Norfolk Broads; wide, quiet sandy beaches; big skies and open landscapes; North Norfolk Coast AONB, Historic Houses & National Trust; RSPB sites and nature reserves; Southwold; Newmarket; Constable Country; University of Cambridge. **Market size:** Domestic overnight trips: 7.5 million Overseas overnight trips: 1.5 million Day visits: 133 million Visitor website: [Visit East of England | Welcome to the East of England]	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
Website	**Design & feel:** Professional, 'official visitor website' feel. Predominantly static photos rather than video content. Focus on information provision. Writing style is informative and	The Visit East of England site provides a good means of

	concise, if a little brief in places. Quite corporate compared to the individual destination sites. **General navigation:** Easy navigation across standard categories (tabs at top of screen and picture boxes): Accommodation; What's On; Culture & Arts; Find Your Destination; See & Do; Plan Your Trip; Get Inspired. Links for the visitor economy sector at the foot of the page. There is no Business Tourism/Conference section apart from a link to 'Cambridge for business meetings & conferences in the East of England'. **Prominent themes:** The *'Unexplored England'* promotion is the prominent message on the landing page. 'Culture & Arts' is the second of five tabs in the navigation bar at the top of the screen and accounts for a high share of content. **Cross boundary promotion:** A prominent 'Find your destination' box leads through to 4 destination options – Cambridgeshire, Norfolk, Suffolk and a featured destination (currently Woodbridge). 'Essex' is not displayed as one of the 4 destinations. Clicking onto each destination takes you through to their own individual websites – Visit Norfolk, Visit Suffolk, Visit Essex and Visit Cambridge. Each destination web site has its own branding and feels quite separate from the Visit East of England website. From the destination websites, it is not obvious how to link through to East of England so people searching for Norfolk/Suffolk/Cambridge/Essex are unlikely to arrive at the Visit East of England site. Accommodation booking covers all East of England destinations for all categories of accommodation. Live availability and booking. Handy results map. Within the 'Get Inspired' section there is a series of blogs under the *Unexplored* promotion covering a number of themes such as: waterways, waterside, seashore, beaches, trails,	promoting and providing information about all four destinations. Navigating through themes delivers options irrespective of geographical boundaries. Accommodation booking works well across the whole area, with or without selection of the individual destinations. Provides the opportunity for destinations to consider where they have synergy with others under particular themes. Potentially a valuable resource for inbound visitors, tour operators and coach companies. 'East of England' doesn't resonate as a destination. A customer is more likely to start their search with for example. 'Norfolk' or 'Cambridge'. Easier links from the individual destination sites to the Visit East

	paths, tastes, nature, history, film locations, National Trust. Covers all destinations involved in the promotion. Striking photos. Itineraries grouped into 9 themes: Arts & Culture, Coast, Food & Drink, Golf, Heritage, Museums, Rail, Walking, Wildlife. Incorporates suggestions for all destinations although some themes offer limited options. **Notable Features:** Live accommodation booking facility for whole of East of England; Results maps which show locations of search item (accommodation/activities/ attractions) – useful to see spread of options across East of England. Visit East of England | Welcome to the East of England	of England site would help to open up the customer's options. this could be especially relevant for accommodation booking and trip planning from a holiday base
Joint marketing activity	*'Unexplored England'* is a marketing initiative that began in June 2020 in response to the Covid pandemic. It is the first time that every destination organisation and every local authority in Norfolk and Suffolk have worked together on a tourism promotion. Finance comes from: Norfolk County Council, East Suffolk Council, West Suffolk Council, Ipswich Borough Council, Babergh Mid Suffolk Council, King's Lynn and West Norfolk Borough Council, Gt Yarmouth Borough Council, Norwich City Council, Broadland District Council, South Norfolk District Council, Breckland District Council, North Norfolk District Council, Broads Authority. Campaign aimed at exploiting the area's fresh air experiences and outdoor activities. Ran in 3 stages, targeting areas with high population and easy drive to the region (London, Midlands, Nottingham etc.)	Good example of multi-partner joint working, promotion and funding.
Destination management	No evidence of this but have not been able to speak with anyone at Visit East Anglia Ltd.	
Partner collaboration	Visit East Anglia Ltd operates both www.visitnorfolk.co.uk and www.visitsuffolk.com.	

	They work with Greater Anglia, the East Anglian rail franchise operator, and have established links with the major transport hubs and providers.	
Operational structure	Visit East of England is the Visitor Economy Sector Group for New Anglia Local Enterprise Partnership and is the customer-facing brand for Visit East Anglia, a public sector, not-for-profit tourism organisation set up in 2011, following the closure of the East of England Tourist Authority and East of England Development Agency. The Visit East of England Sector Group meets four times a year and is chaired by Dr Andy Wood OBE, Chief Executive of Adnams of Southwold. It is a representative board to cover the sector and includes directors of Visit East Anglia. VEE’s President is Lord Leicester of Holkham. Visit East Anglia operates Visit East of England. It is a not-for-profit business-led private company limited by guarantee without share capital. Visit East Anglia directors include some of the most successful regionally based tourism businesses, e.g. Adnams, Flying Kiwi Inns. These directors have no financial interest in the business and take no remuneration. Visit East Anglia is consumer and business focussed and brings a unified tourism voice to East Anglia, under the Visit East of England banner. The organisation is supported by the New Anglia Local Enterprise Partnership (LEP) and is fully aligned with the Economic Strategy. Visit East of England operates as the Visitor Economy Sector Group for New Anglia LEP and with the LEP has published a Sector Skills Plan.	A multi layered organisation linked to the LEP currently but clearly has a strong industry-led independence and track record which means it is adaptable to change.

	Their core objectives are: • To develop the year-round visitor economy; • Making tourism and hospitality a career for life; • To make the visitor offering accessible to the world; • Filling more bed nights; • To develop and share industry data.	
Kent		**Learning for Sussex**
Why Chosen	Potential competitor given product, landscape and location. Visitor facing competitor. 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:** Domestic overnight trips: 2.7 million Overseas overnight trips: 1 million Day visits: 51 million Visitor website:	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

	[Things To Do, What's On, Accommodation - Visit Kent]()	
Website	**Design & feel:** Travel blog feel. Dated-looking drop-down lists. Jumbled layout. Static images. Designed to provide information. Heavy on text. Written in a light, chatty style. **General navigation:** It takes a while to get used to the navigation. The starting point is the 'Experience Kent' tab and opening picture. The picture leads through to a blog-style introduction, with options to click on eight alternative experiences: Outdoor; Escape the Ordinary; Health & Wellbeing; Off the Beaten Track; Creative; Food & Drink; History & Culture; Shared experiences. Alternatively, clicking on the 'Experience Kent' tab takes you to a 3-column x 18-row, drop-down menu, with itemised options including e.g. castles, museums, music festivals, walking in Kent etc. Each one links through to blog-style descriptions. Bypassing the 'Experience Kent' opening picture and scrolling below, there are ten small tab options such as: Beaches/Coast; Places to stay; Food & Drink; Dog friendly; History & Culture. All of these lead through to blogs with promotional, travel-brochure style content. Some are out of date such as ideas for Halloween and Christmas. A pictorial-listing, where all attractions are displayed across the screen rather than within text, is only possible by going to the Experience Kent drop down, clicking on museums, scrolling to the end of the blog then clicking on a link to kentattractions.co.uk. A 'Welcome to Kent' introductory paragraph appears after scrolling below all of the Experience Kent features.	It will be interesting to learn about the success of the EXPERIENCE campaign when evaluation is available. The focus on experiences and the use of lengthy, descriptive text, means that it takes longer to read through and digest the information, but may be successful in stimulating interest for some. Providing additional. easier options to view at-a-glance listings would be helpful for those website visitors not wishing to read through a lot of text. Any use of seasonal suggestions needs to be kept up-to-date. The industry site is a good example of the type of

	The 'Stay and eat' section allows a search for different categories of accommodation, with filters for 13 towns/destinations across Kent. No live availability/booking until you click through to the accommodation's own site. Meetings/conference promotion is limited. 'Visiting Kent for Business' is the last on a dropdown list under 'Getting Here'. Information on 5 top venues is provided and an option to get in touch via a personal email address. A link to the industry site, 'Visit Kent Business' is available at the top left corner of the home page. This provides useful information including Covid-19 business support, EU Transition Business Guidance, a Media Centre and a good array of tourism intelligence. **Prominent themes:** Experience Kent Campaign. Focus is on 'Experience Kent' with suggestions for different types of experience such as 'off the beaten track', 'health & wellbeing', 'creative' experiences. Presentation is all in blog format. **Cross boundary promotion:** From the Destinations tab, Kent is split into three areas– North Kent, West Kent and East Kent, with Kent towns/destinations listed under each (14 in total). A helpful, descriptive introduction is provided for each of the three areas, although all are dated August/September 2019. The 14 destinations are also provided as a list (with links) at the bottom of the page. Clicking on a town/area takes you to a long page of description including visitor highlights and an option to click through to the district visitor site. Seven sites come under the Visit Kent umbrella with consistent design (Visit Ashford and Tenterden, Visit Thanet – Margate, Broadstairs and Ramsgate, Visit Sevenoaks, Visit Swale, Visit Medway, Visit Folkestone and Hythe, Golf in Kent). Others adopt their own style and design.	intelligence and resources that can be provided.

	Notable Feature: Visit Kent Business is a useful industry resource, including a good breadth of tourism intelligence, with links to dashboards for each district.	
Joint marketing activity	**EXPERIENCE** is a project that provides support for businesses, individuals and organisations to develop new, off-season tourism experiences. The project is a 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. The 2021 campaign will run for 1 month (from 29th March 2021). A toolkit is available with advice on promoting the campaign on websites and channels. https://www.visitkentbusiness.co.uk/get-involved/experience-kent-campaign-toolkit/	.
Destination management	Visit Kent Business is an excellent resource providing an extensive library of up-to-date intelligence, including economic impact reports (including for all districts), accommodation research, experience development research, perceptions research, MICE research, links to	

	each district's insight dashboard. There are sections on Covid-19 business support, EU transition business guidance, and Media Centre resources. High-quality research is appreciated by both private and public sectors. For businesses, it's about benchmarking with competitor destinations, data and return on investment. For public sector, it's about footfall. Visit Kent provides members with reports – monthly barometer, biannual "who's coming" (countywide research but districts can pay to enhance with specific info for their area) – this is a combination of IPS data plus their own primary research. GoToPlaces is a commercial arm of Visit Kent providing destination management services to other areas. See below.	
Partner collaboration	The DMO runs 2 national DEF projects – England's Creative Coast and Gourmet Garden Trails of England. The latter has an extended contract.	
Operational Structure	Visit Kent has three main income streams. There is core public sector funding with the County Council the biggest, accounting for c. 10% of Visit Kent's turnover. This is a 3-year contract, to fulfil countywide promotion. The DMO also receives funding from 12 districts i.e. all but one of Kent's districts (Dartford doesn't contribute). Funding from the Districts is on annual contracts. In addition, there are c.150 private sector members. The DMO only deals with businesses "of scale", micro businesses are represented by the districts. Visit Kent also set up an enterprise - GoToPlaces – that provides services to DMOs – ranges from Destination Management advice, running destination websites to full DMO delivery in Hertfordshire, where they have locally based staff doing the relationship management and	

	business investment. VK provides economies of scale with the marketing expertise, travel trade and research expertise in Canterbury. GoToPlaces and Visit Kent are not-for-profit companies. Any surplus generated by GoToPlaces goes back into other projects, creating a strong cashflow for projects. Staffing is 24 FTEs. Board of 10 – mix of public and private. Visit Kent has offices in Canterbury.	
Bristol/Bath		**Learning for Sussex**
Why Chosen	Existing and new collaborations between Visit Bristol and Visit Bath Insight from visitor facing and behind the scenes operations.	
Destination Context	**Local authorities:** Bath & North East Somerset, Bristol City. **Size:** approximately 460 km^2 **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:** Domestic overnight trips: 2.7 million Overseas overnight trips: 1.0 million Day visits: 23 million Visitor websites: [Bath's Official Tourism Site | Visit Bath]	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

	[Visit Bristol - Official Bristol Tourist Information Site]()	
Website	**Design & feel:** Visit Bath and Visit Bristol have very different looks. Visit Bath has a formal, classical look whilst Visit Bristol has a more informal design with a quirky font. Visit Bath has an Inspiring introductory video featuring well known locals including sports stars, chefs, musicians, comedians. Otherwise images are predominantly static. Visit Bristol uses static images although a Youtube tab offers a tourist guide and a number of other videos, including food markets, pubs and bars, cafes, restaurants, shopping. Both sites are designed to provide information and inspire and both keep text brief with the option to read or click through to more. **General navigation:** Visit Bath: Well structured, clearly laid out and easy to navigate. Standard, main tabs cover: Things to do; Where to Stay; Eat and Drink; What's On; Plan your Visit; Inspire Me. Includes a handy top ten things to do and top ten must sees. The foot of the opening page has tabs to view recent social media posts – Facebook, Twitter and Instagram. Tabs at the top of the opening page lead to the industry site, box office, conferences/business events, travel trade, media and a blog. Visit Bristol: Well structured and easy to navigate. Standard main tabs: Where to stay; Things to do; What's on; Food & Drink; Shopping; Inspire Me; Your Visit; Covid-19. Quirky tabs along the bottom offer newsletter sign up, online visitor guide, blog and special offers. Indistinct tabs at the top lead to meetings/conferences, travel trade, press and 'about' which includes a summary page on Bristol's tourism economy. At the foot of the page there is the option to translate the site into 14 different languages. Search items (things to do/accommodation/food & drink etc) can be viewed on a map of the Bristol area. Accommodation search includes an online availability facility.	Visit Bath introductory video captures interest. Visit Bristol's 'explore the area' maps provide an effective means of promoting a wider area. Visit Bristol's language translation function is helpful for capturing inbound visitors – leisure and business. The two contrasting looks of the Bath and Bristol websites illustrate the importance of design in conveying a destination's brand and character.

	Prominent themes: Bath: Wellbeing; Bristol: City buzz **Cross boundary promotion:** Visit Bath has a 'Beyond Bath' section under Things to Do, covering the West Country, Stonehenge and the Cotswolds. Visit Bristol has a prominent 'Explore the Area' sketch map on the opening page, allowing the user to click on an area (Coastal Somerset, Rural Somerset, North Bristol, Central Bristol, East Bristol, South Gloucestershire & South Cotswolds). This opens up the array of visitor information for these areas, all within the Visit Bristol site. These 'Areas of Bristol' are also accessible via the 'Your Visit' tab. **Notable Features:** Visit Bath: attractive website design; introductory video. Visit Bristol: Explore the Area map; Language options.	
Joint marketing activity	Consumer brands, campaigns and identities of Visit Bath and Visit Bristol are being retained, post an amalgamation of the two DMOs (see below). The new organisation will provide a consolidated approach to business development through the international travel trade network, and the delivery of a regional convention bureau - Meet Bristol and Bath. New websites are being developed for both the travel trade and convention bureau, as well as a new industry site to support local businesses in the tourism, hospitality and leisure industry and to support and develop the membership programme. Destination Bristol and Bath wants to retain a manageable and workable footprint. They do not want 'land grabs' of members and businesses.	.
Destination management	There is a single membership/collaboration/relationship which creates a stronger national voice. There are some shared functions as a result of the Combined Authority, e.g. on transport.	Combined Authority is a driver for collaboration but DMO remains more about marketing and business support

Partner collaboration	North Somerset are now coming into the partnership and there is collective goodwill to make this work.	
Operational structure	There is an ongoing history of informal collaboration between Bath and Bristol for over 15 years variously around travel trade, conference and business events and databases. That joint working has varied over the years depending on personalities and politics. The creation of the LEP, elected mayors and combined authorities created a stronger will for more close working. Commercial pressures on DMOs drove competition for business members. This pincer movement of external factors pushed both parties towards looking at a more formalised relationship. Collaboration on areas of common interest and reduced overheads have also driven the partnership. Furthermore a period when Visit Bath took a business decision to focus on commercial promotion meant that core DMO functions were not delivered. The two DMOs are now a single organisation. The memorandum and articles are to be finalised shortly (as at 12 April 2021). 4 staff will be TUPED from Visit Bath to Destination Bristol. The head office will be in Bristol with a satellite office in Bath. Post Covid the organisation will be run as a hybrid with a combination of office, home and 'out and about' working. 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.	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. Two way benefits when looking at larger private sector players in the industry.
Aberdeen/Aberdeenshire		**Learning for Sussex**
Why Chosen	Coast, town and countryside offer.	

	Aberdeenshire is a county but with less profile than some of its neighbouring destinations e.g. Highlands. Changed how partners collaborate in last 5 years. Launched new joined up website.	
Destination Context	**Local authorities:** Aberdeen City & Aberdeenshire **Size:** approximately 6,300 km^2 **Population:** 0.49 million (Aberdeen City + Aberdeenshire). **Distinct features/products:** Granite City, Scenery, Walks & Wildlife, Castles, Balmoral Castle, Whisky, Golf, North Coast 500 route. **Market size:** Domestic overnight trips: 0.96 million Overseas overnight trips: 0.23 million (Grampian region) Day visits: 12.3 million Visitor websites: [Aberdeen and Aberdeenshire Visitor Guide - VisitAberdeenshire (visitabdn.com)](visitabdn.com)	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
Website	**Design & feel:** Clear, professional look with appealing layout. Full screen, striking opening image with option to play video. Designed to provide information and inspire. Introductory sections are written in an informative, travel writing style. They give brief overviews and a flavour of ideas/options. Predominantly static images with a few short video clips. Quite formal with product pitched at adult market rather than family fun. **General navigation:** Easy navigation with six core tab options which are always available at the top of the screen: What to do; What's on; Food & Drink; Plan Your Trip; Blog; Inspire Me. 'What to do' tab gives drop-down options for: Touring, Adventure Activities, History &	Good example of a site that is clear and easy to use. User can quickly navigate to find information for specific activities/ places/attractions, or choose to delve into more descriptive text.

	Heritage, Food & Drink, Great Outdoors, Culture & Arts, Golf, Aberdeen City Break. Each one has an option to view a short video clip. Each theme has a short, overview/introductory script, followed by a clear button to click to 'view listings'. Each listing has a picture to click on which then provides detailed information. The opening page provides the option to explore 'Winter' or 'Spring'. Information is then provided according to the season. Also on the opening page is a Social Wall – an attractive, full-spread display of posts (#visitABDN & #beautifulABDN) on Facebook, Twitter & Instagram. Industry site, Content Hub, Business Events and Travel Trade clearly available at the top of the page. Industry site has marketing materials available, destination strategy, toolkits, insight reports/links. No live accommodation booking. A 'Map your Trip' option allows you to see attractions/venues/activities on a map, such as 'Castles and coast', 'Film famous locations', 'Must eat foodie locations', '48 hours in Aberdeen'. There is also a 'Make your own map' option where you can assemble attractions/accommodation/activities and plot them on the Aberdeenshire map. **Prominent themes:** Great Outdoors pictures dominate the Social Wall. Extensive options under 'Food and Drink'. Suggested itineraries are: Castles of Deeside, Golf in North Aberdeenshire, Adrenaline, Just a Drop, Unforgettable Taste, Whisky Galore. **Cross boundary promotion:** Options provided for Aberdeen City and Aberdeenshire throughout. Under 'Plan Your Trip', there are 31 'Towns and Villages' to explore. Each one	Map function, including personal 'map your trip' option, is useful to see the spread of attractions/venues/activities across Aberdeenshire. Attractive Social Wall.

	has a summary script and a 'view listings' option, providing information on the town's visitor products. **Notable Features:** Ease of use, Social Wall, Winter/Spring split, Map your Trip. the logo and use of wording for **Aberdeen**shire simply and clearly plays up both city and County and their connection.	
Joint marketing activity		.
Destination management	To date the focus has been on marketing and business support though some of the partner collaboration projects (see below) touch on product investment and management. Travel trade sector is a high priority and delivered in a coordinated way across the County with tourism businesses including an in-depth masterclass project. This approach is unusual for Scotland. The DMO sees coal face connection with businesses as essential for success.	
Partner collaboration	Visit Aberdeenshire is working with regional partners including Opportunity NE (main funder) on developing Adventure Tourism across the region. The Tour of Britain will finish in Aberdeen. The DMO is also working with the cycling industry to develop and promote 10 new cycling routes, which includes linking and badging existing routes. Longer term Visit Aberdeenshire wants to help create east coast cultural corridor collaborating with Perth and Dundee. Both cities have benefited from strong cultural investment. Aberdeenshire, especially the city, is looking to mirror that approach through investing in a cultural renaissance which to date has included investment in the city's art gallery.	
Operational structure	A new cross County approach to collaborative working on the visitor economy was motivated by a recognition that tourism could help transform the local economy away from	External factors drove change and encouraged partners to

	oil dependency and support growth in a relatively short period. As the oil related jobs go, tourism-related start-ups provide business opportunities locally, retaining populations and supporting local quality of life values. Visit Aberdeenshire is a non-membership model, funded by the local authorities and a philanthropic organisation with an annual budget of £1.4m. There are 14 staff (12 x f/t and 2 x p/t). There has been consideration of licensing DMO brands as an additional income opportunity. The DMO sees the airport as a strong asset and is working with EasyJet on potential in-kind/cash support. Historically the city and rural area have not collaborated strongly around tourism. There was a political need for compromise and a recognition that a collaborative approach would ultimately deliver greater returns to all. Post Covid there will be some return to targeted city specific promotions reflecting that city centres have been hardest hit.	compromise for a clear shared benefit. Aberdeenshire benefits from very strong public sector ongoing support to the DMO, which is unusual in these times.

CONSULTATION SUMMARY

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 as follows:

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 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 Buzz 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.