

Sussex Visitor Economy

Vision and Medium Term Actions

July 2021

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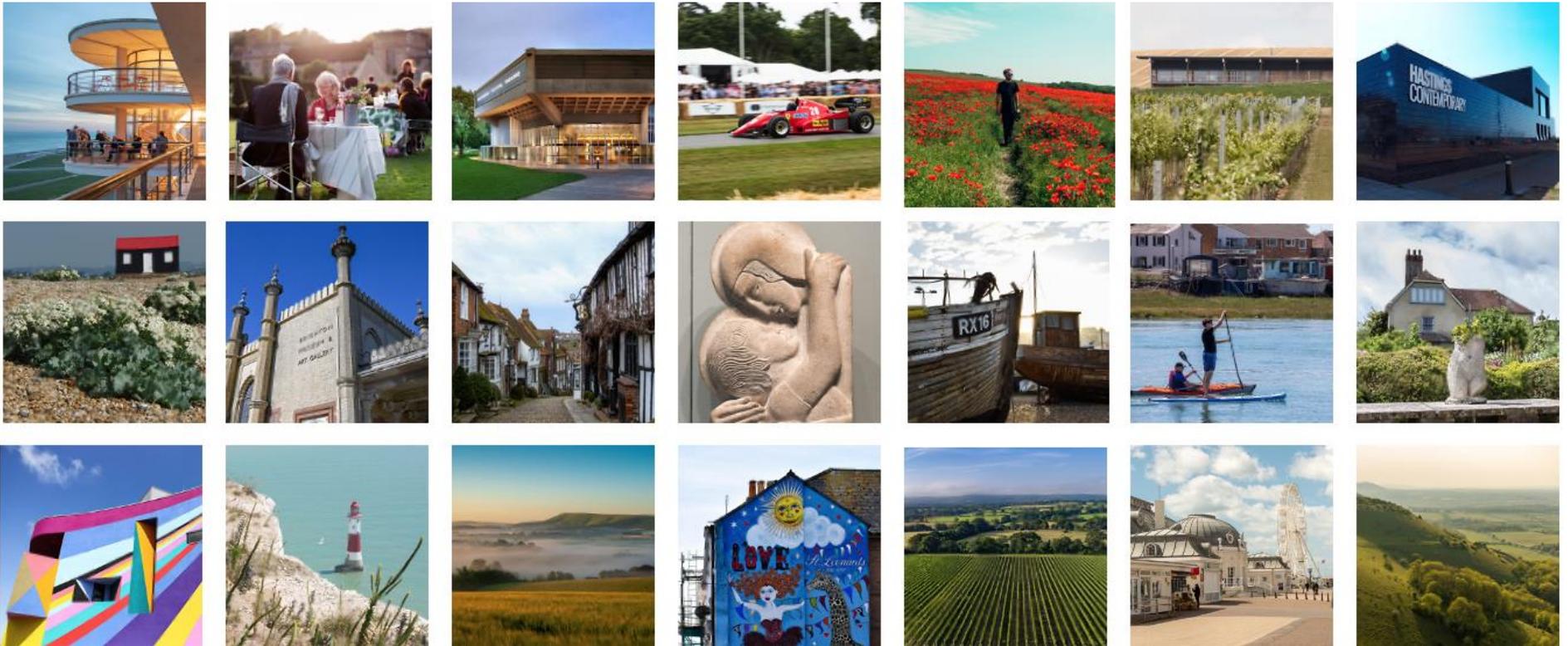
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# 1. BACKGROUND



## 1. BACKGROUND: ABOUT THIS PROJECT

This plan sets out a vision and high-level priorities for the next decade. It is a strategic document setting out how Sussex can build back better post the pandemic.

### The Brief

In 2021, Blue Sail was commissioned to produce an evidence base to inform a medium term action plan and long term vision for the Sussex visitor economy that would be delivered collaboratively by Brighton & Hove City Council (BHCC), East Sussex County Council (ESCC) and West Sussex County Council (WSCC).

### The Evidence Base

This report draws on the extensive research undertaken to inform the way forward. As part of this project, Blue Sail has:

- ▶ Collated and analysed national and regional tourism and other relevant data

- ▶ Interrogated trends on changing visitor behaviour emerging from the pandemic and how these will influence tourism strategic decision-making for Sussex
- ▶ Reviewed tourism market segments
- ▶ Undertaken primary research with previous visitors and non-visitors to Sussex to understand perceptions and visitor behaviours
- ▶ Spoken with a dozen tourism thought leaders within Sussex and nationally
- ▶ Researched tourism partnerships that are working in new ways across larger territories and spoken with their chief executives.

The detail of this evidence base is available as a separate volume.

### About This Report

This report is cognisant of the emerging trends as the world re-emerges from 18 months of lockdown. These trends are about a ‘new normal’ – where greener and more mindful priorities work harmoniously alongside economic growth.

For tourism that means sustainable growth that plays to the natural assets of Sussex, that encourages longer stays and shorter journeys for UK leisure visitors, provides creative and productive environments for doing business, and prioritises higher spend international markets arriving on the doorstep. It is about making more of what Sussex already has.

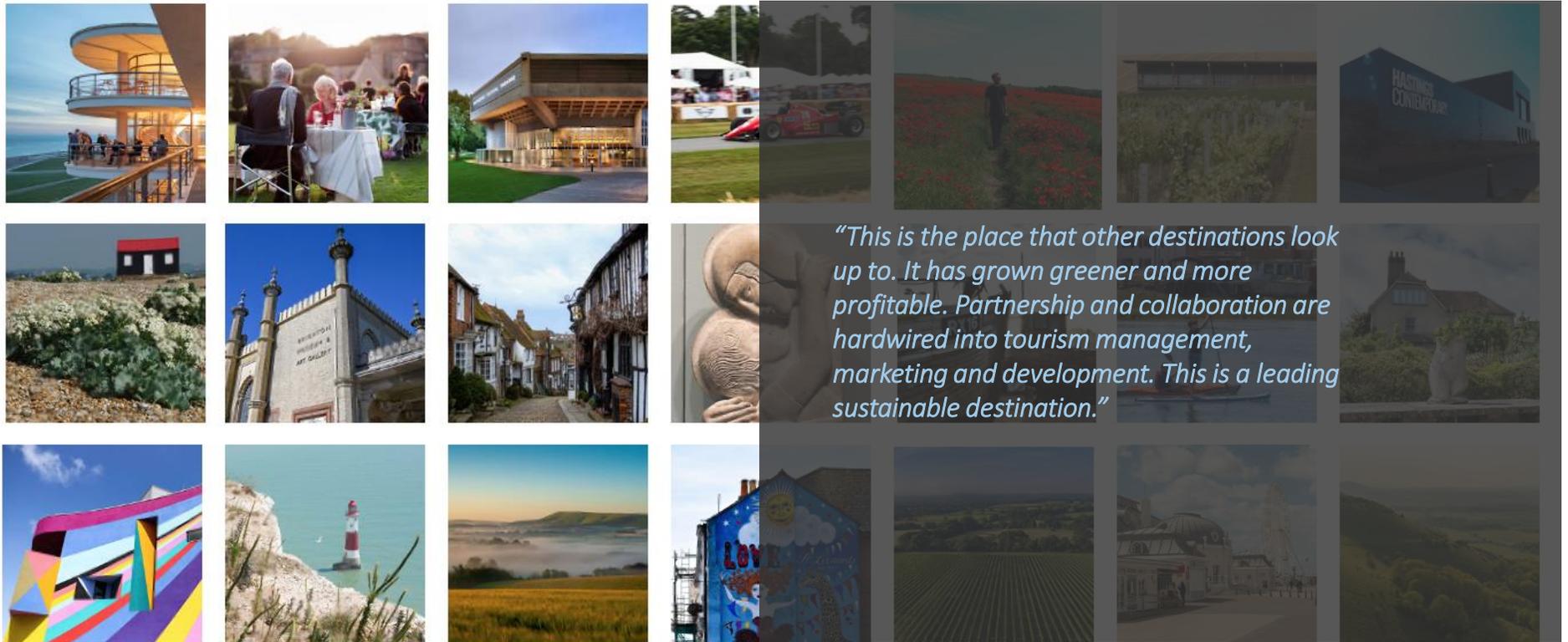
It is about making thematic and locational connections between destinations and creating emotional connections for visitors, encouraging them to make greener choices that also enhance their experience.

It is about building on the partnerships already in the County and creating a high-level strategic pan-Sussex collaboration to simplify messaging and to drive impact that will enable Sussex to achieve more. It is about energising the creativity and resourcefulness of the industry.

This report is a first step towards a new pan-Sussex vision for tourism, a new focus and a new way of working.



## 2. VISION



*"This is the place that other destinations look up to. It has grown greener and more profitable. Partnership and collaboration are hardwired into tourism management, marketing and development. This is a leading sustainable destination."*



## 2. VISION – SUSSEX VISITOR ECONOMY

A new collaborative partnership model is the only way to drive the change that Sussex needs to achieve this vision and to have one voice with government and funders. It is the only way to achieve stronger awareness and reach in more distant markets.

Sussex destinations, working together are:

- ▶ **Ambitious..** Focussed on growth in the value and quality of tourism and jobs, with imaginative actions that drive staying visitors and business tourism.
- ▶ **Market Driven..** Targeted and driven by what visitors want. Focussed on delivering and developing a destination that is top of mind.
- ▶ **Meaningful..** More than just a sum of it's parts, Sussex is distinctive and authentic and delivers an emotional connection. Its economic success is achieved by valuing the wellbeing of people, places and the environment

This collaborative approach aligns with many of the recommendations from the recent DCMS De Bois Review of DMOs published in September 2021.

### Sussex Visitor Economy Outcomes for 2030

By 2030 Sussex will have built a year-round sustainable visitor economy as big as Wales. A place that puts the wellbeing of people and the environment at the heart of everything it does, where locals nurture what makes it special and proudly share those qualities with visitors.

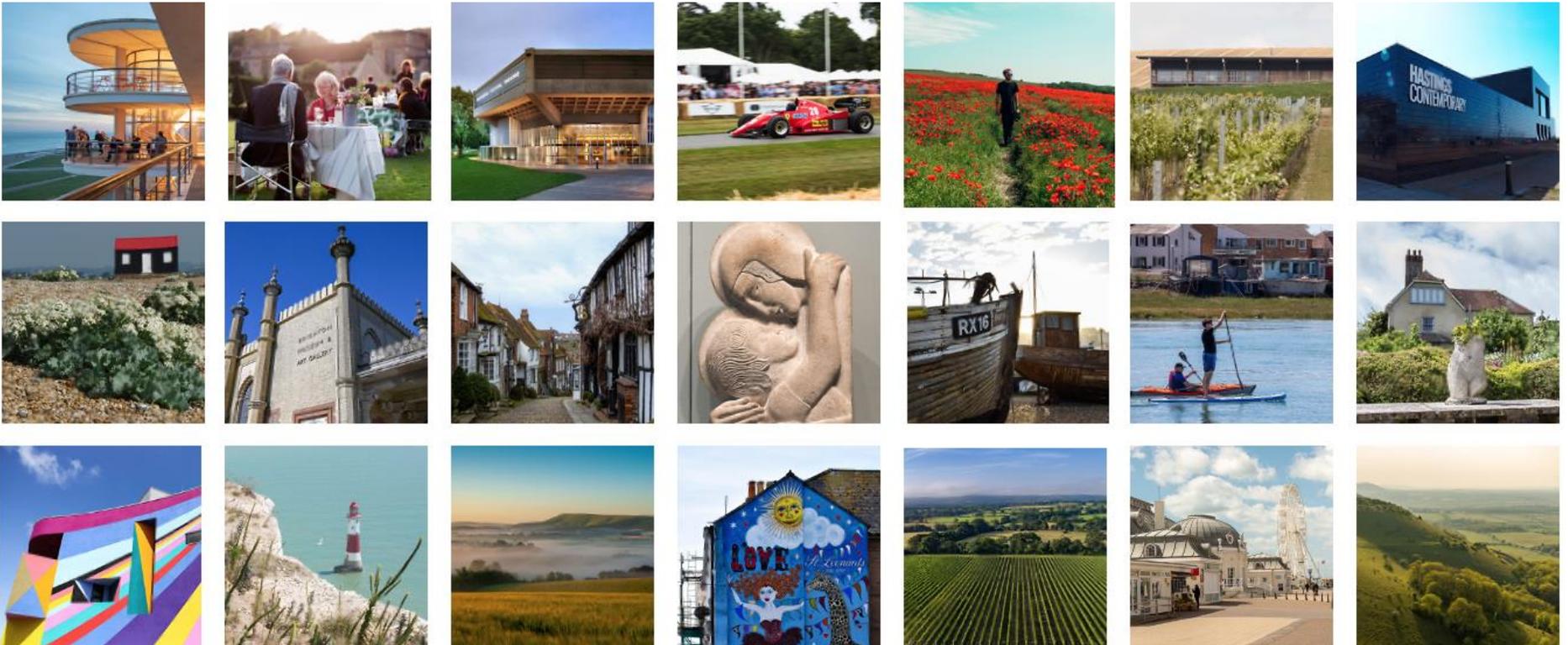
It will attract more higher value discerning international and domestic visitors looking for a short break as well as organisers of business events, meetings and conferences.

The prize from this collaborative working is:

- ▶ **£7.5bn** of impact (£2.5bn more than now)
- ▶ **35,000** new quality jobs – linked to training, education and skills development and working as part of the Local Skills Improvement Plan
- ▶ **Recognition** across England as a destination leader in sustainable tourism, industry leadership and destination partnership



### 3. MEDIUM TERM ACTIONS



### 3. MEDIUM TERM ACTIONS: INTRODUCTION

The medium term actions that will make a difference for Sussex fall into two distinct areas:

- Market Focus & Positioning
- Experience Development and Underpinning Foundations.

These actions are not everything that will happen. Existing Sussex DMOs and organisations supporting tourism activity will continue to provide many of the vital functions and services they do now within their locations and for their businesses.

The medium term actions set out here are the additional strategic pan-Sussex activities that justify partners coming together. They respond to the challenges and opportunities identified through all the research and baseline work undertaken as part of this project.

They help partners move closer towards the prize of an extra £2.5bn of impact.

#### Market Focus & Positioning

Tourism is big business for Sussex. Sustainable growth is about growing value rather than volume, and about a year round industry. That means growing staying and international trips.

Sussex has a strong visitor offer. It has quality experiences and huge variety. But with a few exceptions that offer is extremely similar to many other leading UK destinations.

In a highly competitive marketplace it is critical to make a big impact with potential visitors, investors and funding partners, and that requires scale. It is also essential to be clear about what you stand for and how you stand out.

Sussex needs to find a positioning that achieves cut-through to be able to create a compelling brand.

*“Visitors don’t care about ‘Sussex’ – you need a compelling brand e.g. Wild Atlantic Way, Romantic Route, that should encompass the idea of experiential travel”*

#### Tourism in Sussex

- £5bn of impact and 74,000 FTE jobs - the same size as Iceland’s tourism economy and 2/3 that of Wales.
- 62m visitors
- Staying visitors account for 11% of visits and 50% of spend
- Overseas visitors account for 2% of visits and 19% of spend.
- 65% of survey respondents who identified as ‘non-visitors’ to Sussex had in fact visited. They just weren’t aware they had been in Sussex.
- 96% of visitors and 84% of non-visitors think Sussex offers what they are looking for in a destination.



### 3. MEDIUM TERM ACTIONS: CONTINUED....

#### Experience Development & Underpinning Actions

Sussex has many natural advantages of location with good access to large domestic and international markets arriving at Gatwick Airport, Newhaven Port and its proximity to London.

But a fragmented approach to tourism across the County often means experiences are not 'joined up' and critical mass is not achieved. As a result assets are frequently underplayed and opportunities are lost.

There is potential to attract more of the priority markets for Sussex but that needs to be achieved in a way that retains a balance between respecting local communities, celebrating local culture and conserving the quality of the natural and built environment.

*"Visitors are looking for 'remember forever' and 'goosebump experiences'"*

The importance of the environment has risen up the agenda post-Covid.

The climate crisis, the need to develop more sustainable and sustaining ways of living and net-zero aspirations, provide challenges and opportunities for tourism.

*"Post-Covid international travellers are coming back wanting to be 'good travellers'"*

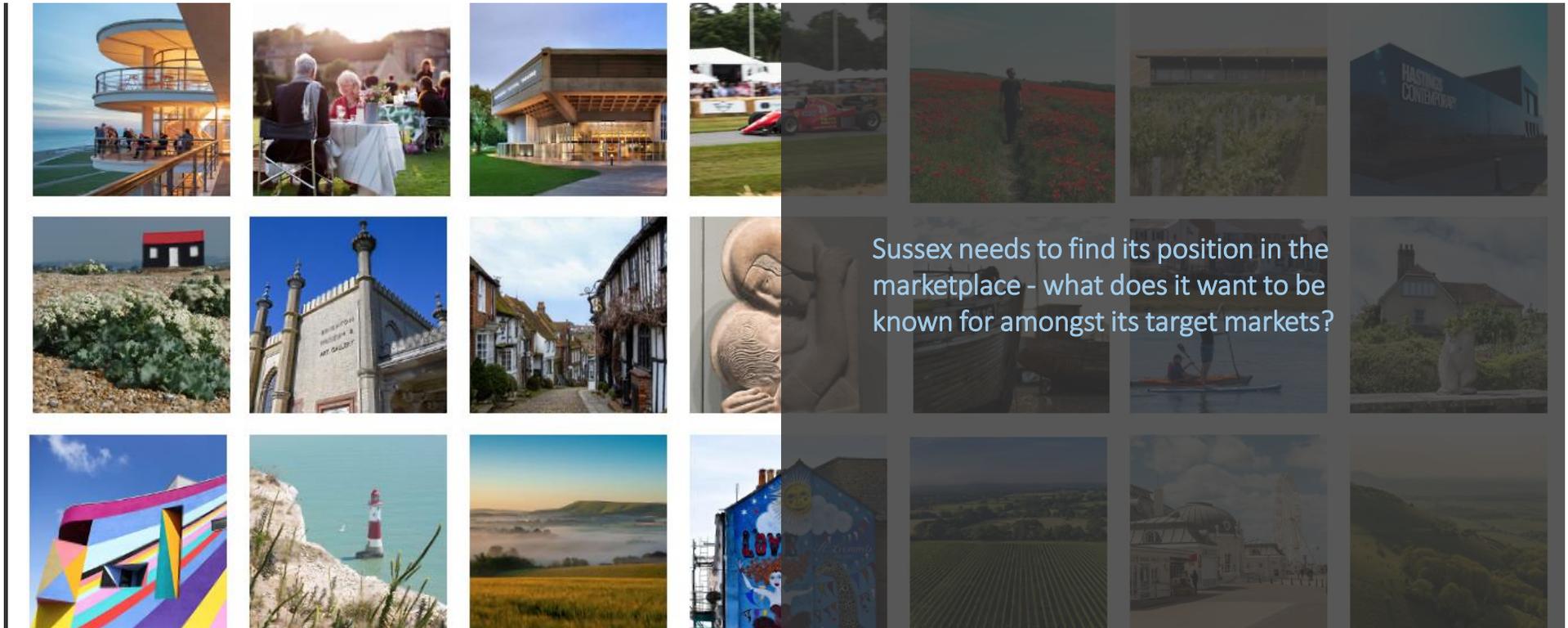
*"International travellers want more mindful travel"*

Developing and managing the visitor economy in Sussex must be underpinned by strong environmental credentials that reinforce the quality of life in the County and contribute to delivering the environmental ambitions of Sussex.

The industry needs to be equipped with the skills and information to make informed decisions and the confidence to invest. Partners need more and consistent up-to-date data to inform decisions and measure impact.



### 3. MEDIUM TERM ACTIONS : POSITIONING & MARKET FOCUS



### 3. MEDIUM TERM ACTION: IDENTIFY MARKET FOCUS

Partners must be clear about pan-Sussex target markets; those which have the strongest growth potential in the UK and internationally. There are four Visit England/Visit Britain market segments that are a good match for Sussex as a whole. Some individual destinations may have additional target markets, e.g. families however pan-Sussex growth means you need to focus

	Country-Loving Traditionalists	<p><b>Profile</b> - Empty-nesters, good quality, local food &amp; drink, cultural experiences.  <b>Rationale</b> - They represent the largest travel segment in the UK. They are moderate spenders but take multiple trips per year, are already visiting Sussex and have potential to shift from day visits to overnights.</p>
	Free & Easy Mini-Breakers	<p><b>Profile</b> - Younger, no kids, looking for ease of travel, cultural experiences and events but will take part in a range of activities  <b>Rationale</b> – They represent the second largest travel segment in the UK, have mid levels of affluence and enjoy spending on themselves.</p>
	Explorers	<p><b>Profile</b> - Nature lovers, embrace local culture, relaxation and off the beaten track experiences, enjoy parks, gardens &amp; outdoor leisure.  <b>Rationale</b> – The second largest of VB’s international segments (23%) and a VB priority segment in Sussex’s existing markets of Germany, Netherlands, France and Australia.</p>
	Buzzseekers	<p><b>Profile</b> - Younger, free-spirited, looking for new experiences, local food &amp; drink, ‘wow’ moments, hands-on learning and non-serviced accommodation.  <b>Rationale</b> – The largest of VB’s international target segments (38%), ranked mid-high value and a VB priority segment in Germany, Netherlands, France, Australia and USA.</p>

#### Existing Markets

Here is a snapshot of Sussex’s current visitors:

**Domestic** – Predominantly older couples (55+) travelling from South East and London, from ABC1 socio-economic groups without children.

**International** - The majority are from Germany, Netherlands, Belgium, France, USA, and Australia.

#### Business & Conference Visitors

Business and conference visitors should remain a priority for Brighton and for Sussex more widely, using the destination-wide leisure offer, and the quality of life and environmental values of Sussex to appeal to the heart and to create a point of differentiation between seemingly similar destinations.



### 3. MEDIUM TERM ACTION: DISTIL POSITIONING

Sussex should be positioned to resonate meaningfully and emotionally with its priority markets. The positioning should convey an image that is then delivered in quality experiences.

#### Current positioning

Each region within Sussex positions itself differently and some of the large iconic attractions refrain from elaborating on the destination any further than as a descriptor for their location.

**East** – quintessential English countryside, historic towns, beautiful countryside

**West** – serenity, market towns and viticulture

**Brighton** – vibrant, offbeat, fun

#### What do we mean by ‘positioning’?

- It’s about concepts, not language: it’s what you want to convey but not how you say it
- It’s what we want our targets to think, and think about, when they hear “Sussex”
- It’s based on what our target visitors want, and what we can deliver

#### What does success look like?

- When stakeholders and influencers use it – in marcomms and in product development
- When it takes on a life of its own – growing organically and virally
- When it appears in customer research – the same concepts, in their own words

#### Positioning must be ...

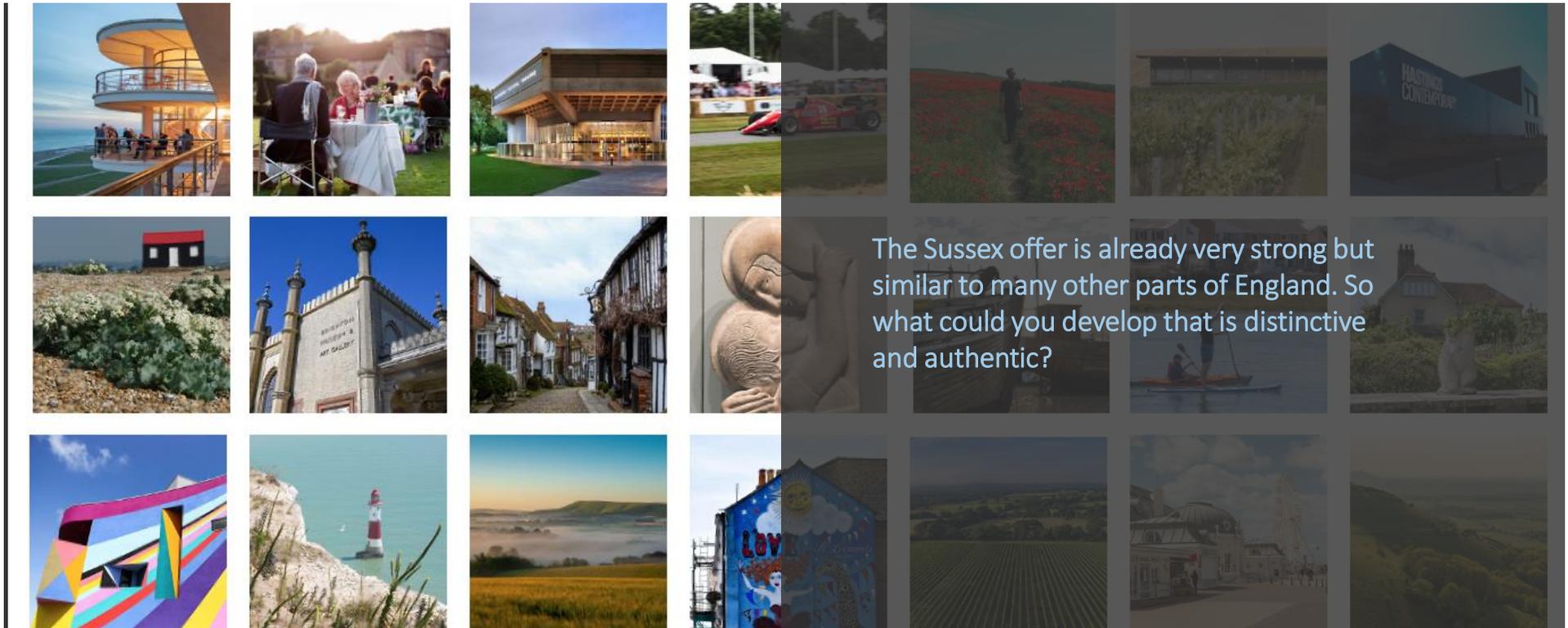
- ▶ SIMPLE – so it is easy to remember and share
- ▶ CONSISTENT – repeated over the long-term
- ▶ DISTINCTIVE – different from the competition
- ▶ REAL – it must ring true to locals and visitors

A strong proposition for Sussex can be built around it’s culturally-rich, gastronomically-centric history and the way that life appears to revolve around the arts and the pursuit of good living.

This offers a significant opportunity for Sussex, with its historic towns, viticulture, gardens and beautiful countryside, coupled with the artistic vibrancy of Brighton, to develop a proposition which connects emotionally with visitors, unites geographic areas and gives a base on which to build marketing activity and product development, and which appeals to travellers post-Covid.



### 3. MEDIUM TERM ACTIONS : EXPERIENCE DEVELOPMENT



### 3. MEDIUM TERM ACTION: EXPERIENCE DEVELOPMENT

There are a handful of ‘Grand Projects’ – development projects that have the potential to start to shift what Sussex is known for.

#### **Off The Beaten Track (Camino Sussex)**

The first project proposes knitting together the existing and planned walking and cycling networks into a pan-Sussex web of trails and itineraries that demand exploration and get visitors out of cars. Addressing connections and broken links between what is there now and joining it up with destination highlights. There are opportunities to include movement along the coast and water to make this experience unique to Sussex.

This project makes a connection with the Sussex landscape and people and a disconnection from the stresses of daily life. It responds directly to many of the challenges and opportunities in a post-covid world and improves tourism connectivity across the region.

#### **Sussex Events**

Sussex already has a range of incredible events and it would be all too easy to say ‘do more’.

But this is not about more – it is about leveraging the impact of existing signature events. Expanding their scope, duration, reach and impact so that the benefits can be spread across Sussex and beyond the few days during which they take place.

Events have been hard hit and established events should be supported and encouraged to build back strongly. They don’t need more competition. But this is an ideal time to engage with them to see what more could be done to build stronger benefits on the back of their success including:

- ▶ Showcase Sussex experiences that connect thematically to the event e.g. Tangmere or Wings Museum to Airbourne
- ▶ Creating fringe events that are ‘add-ons’ to the main event and which take place in other Sussex locations and build the event brand
- ▶ Curating a wider offer that can appeal to visitors to the events and keep them ‘sticky’

#### **A Year Of...**

A 10 year plan which brings a focus to development, marketing and partnership.

Food and wine, Gardens, Culture, Heritage, Coast, Wellbeing, Walking & Cycling can each take turns as potential thematic headlines for ‘A Year Of...’.

Each thematic focus is the basis on which sectoral partnerships are established and campaigns are developed pan-Sussex. This yearly focus also brings attention to the development needs within each theme.

It is a great test-bed for collaboration pan-Sussex and each year could be led by a different destination, spreading the load and building expertise.

Each ‘Year of..’ will require two years of lead in, developing the partnerships, planning development and campaigns prior to the focussed year of delivery and to be followed up by a period of evaluation.

These actions will be aligned to the target markets and the new positioning.



### 3. MEDIUM TERM ACTION: UNDERPINNING ACTIONS

Sussex has a few opportunities and challenges which are common to all of the destinations within it. Tackling these together makes it more likely that they will gain traction and that Sussex will move forward together.

It is all too easy for one destination to look across at its neighbour and see them as competition. But most visitors don't see it like that and there are a number of projects which tackle common opportunities and challenges that Sussex destinations should work on together.

#### **Stay Sussex**

If 11% of your visitors generate 50% of the impact – and they are your staying visitors then you want to do everything needed to grow that market. There needs to be a clear reason to visit and the recommendations here for Experience Development and Positioning address that. But you then need to service the demand you hope to generate.

Stay Sussex is about creating more distinctive accommodation in rural and urban areas. Accommodation with sustainability designed in and which responds to the needs of visitors post-Covid.

The accommodation can align to other thematic strengths and projects (e.g. wellbeing, food and wine) and could be developed with a variety of landowners and the large Sussex estates. Improved planning policies, research, identified sites and work with private investors are all follow on actions.

#### **Sustainable Sussex**

This is about the connection between visitors and the landscape, culture and people of Sussex.

Tackling climate change and achieving net-zero targets are hard to deliver alone. Working together on initiatives to support the sustainable development of tourism pan-Sussex makes sense.

This requires sustained action by the public and private sector and there is a need to understand the baseline impact now. From that will flow a

wide range of initiatives within the sector – from energy and water conservation to local sourcing and supplies, from recycling to improving natural habitats. A Sustainable Sussex story would achieve much more cut-through than could be delivered in individual destinations.

#### **Research & Insight**

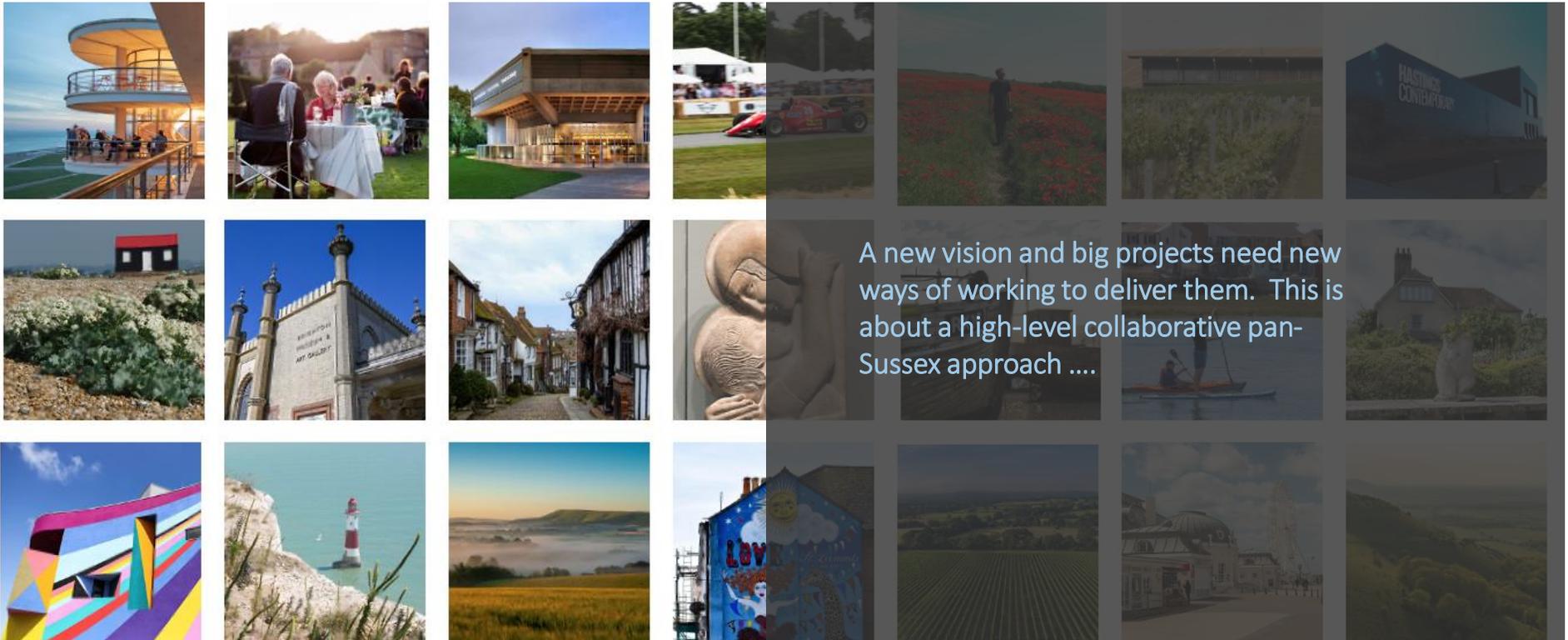
This project has highlighted the importance of understanding visitors and their needs and of having a robust assessment of the current performance of tourism across Sussex. Many destinations deliver discrete research activity and there is merit, and potential financial savings, in pulling this together pan-Sussex and augmenting it. This could include hotel studies and performance, economic impact studies and visitor surveys.

#### **Digital First**

Sussex destinations and businesses should lead the way in applying digital technologies to engage new audiences and enhance the visitor offer in line with the DCMS Tourism Recovery Plan.



## 4. ORGANISATION & DELIVERY



## 4. ORGANISATION & DELIVERY : CONSIDERATIONS

Sussex has many Destination Management Organisations (DMOs), a national park and other local partnerships responsible for the marketing, development and management of tourism in their destinations. These organisations also provide important local industry networks for small businesses.

However, it is widely acknowledged that some tourism functions are better addressed in larger territories to be successful, create impact, demonstrate value for money and access funds.

Visitors don't recognise geographical boundaries. They respond to individual places and their communities, and to trails and routes, stretches of coast and designated areas like National Parks.

Visitors don't know which destinations lie in East Sussex and which in West Sussex. The South Downs National Park (SDNP) extends beyond Sussex and in some instances boundaries and characteristics stretch beyond into neighbouring Counties.

Therefore it makes sense to collaborate pan-Sussex for the Positioning and Big Projects set out here. There may be future initiatives where working with neighbouring Counties on specific projects makes sense too.

The DCMS Review of DMOS (published 14/09/21) makes a number of recommendations including tiered DMOs organised regionally with improved

board representation and stronger partnership among the public, private and community sectors.

There is no cookie cutter model for the perfect tourism partnership but there is a noticeable trend towards larger tourism organisations. The form that collaboration takes varies across England, determined by past experiences, current arrangements, destination needs and political will.

### Tourism Partnership Models

Blue Sail research identified some shared characteristics of successful larger tourism partnerships:

- 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.



## 4. ORGANISATION & DELIVERY : A FEDERAL PARTNERSHIP

A Federal Partnership for Sussex means a partnership of equals who work together on high level pan-Sussex initiatives.

The Federal Partnership should be the **voice of tourism for Sussex** with a clearly agreed role and remit to oversee pan-Sussex tourism activity. It needs to be:

- ▶ **Big picture & highly strategic** .....tackling issues and opportunities that are truly pan-Sussex
- ▶ **Responsible for pan-Sussex tourism infrastructure**.... making decisions and being accountable
- ▶ **Fundraising** .... using the strength of a pan-Sussex partnership to leverage and bid for funds to deliver additional activity.
- ▶ **Facilitating and coordinating** ... with DMOs and existing tourism partnerships
- ▶ **Flexible**..... to respond to changing circumstances, needs and opportunities.

Members of the Federal Partnership should comprise the heads of all the DMOs, senior representatives from each of the local authorities in Sussex, the SDNP, the Local Enterprise Partnership (LEP), Gatwick Airport, Sussex Modern, with representation from other organisations (e.g. Historic England, Sussex Past, Goodwood) on specific projects where relevant.

The actions set out here, create a programme of initiatives. Early work for the Partnership will be to agree and develop the tourism positioning and to agree the themes for the Year Of... programme, how this might be funded and identify delivery partners.

In addition, to grow the MICE market potential, the partners should explore the best way of collaborating on business events, potentially exploring a strategic lead for a pan-Sussex Convention Bureau using established expertise.

Funding and resourcing requires a collaborative approach that uses existing resources productively and focuses on pan-Sussex bids to access new funding streams.



In broad terms the approach should be to:

- ▶ Seek to pool existing DMO resources for research and insights projects to deliver better ROI
- ▶ Use existing public sector resources that are not exclusively about tourism for pan-Sussex projects, e.g. using transport funding for 'Off The Beaten Track (Camino Sussex)'
- ▶ New funding sources which might include DCMS or VisitBritain (following the DMO review), other government funds (Levelling Up, Future High Streets, Community Renewal, Shared Prosperity Funds ) as well as UK Infrastructure Bank and LEP investment.

## 4. ORGANISATION & DELIVERY – ACTION TIMETABLE

Over the next few pages we summarise the actions from this document, identifying what needs to happen over a short, medium and longer term timeframe and which markets these actions will benefit.

Action	Short Term	Medium Term	Long Term	Target Market
Positioning	Develop a strong proposition that reflects Sussex and appeals to target markets	Use positioning in campaign delivery with a focus on domestic (post-covid) then international	Develop tools to support use by tourism industry pan-Sussex	Primary – International Secondary – Domestic
Off The Beaten Track (Camino Sussex)	Bring together right of way/cycling and walking officers to develop pan-Sussex plan	Prioritise development and secure funding (bid) to implement	Develop itineraries and experiences around the emerging network	Free & Easy Mini Breakers Country Loving Traditionalists
Sussex Events	Major events and tourism partnership to identify and develop best practice for growing impact	Roll-out and evaluate events impact – develop Sussex reputation for major events	Grow reputation for events innovation	Free & Easy Mini Breakers Buzzseekers Explorers
A Year Of...	Develop an outline calendar for Year Of.. Starting in Year 1. Develop plans for first 'Year of..' and form partnership	Roll out first 'Year Of..' and use it to develop new experiences and create strong PR and campaigns	Evaluate each 'Year Of..' to develop lessons to continue the approach	Domestic & International
Stay Sussex	Pan-Sussex Hotel Futures Study commissioned to identify gaps and opportunities	Review and develop planning policy, identify development sites and market to developers	Guidance to small scale/independent developers of distinctive accommodation	All Markets



## 4. ORGANISATION & DELIVERY – ACTION TIMETABLE CONTINUED

Action	Short Term	Medium Term	Long Term	Target Market
Sustainable Sussex	Pan-Sussex Sustainable Tourism baseline to identify gaps and opportunities	Develop and identify funding to support actions for public and private sector	Evaluate and monitor progress. Create best practice guidance for tourism industry	All Markets
Research & Insight	Create Pan-Sussex depository for tourism research. Identify shared research needs	Commission and deliver research (accommodation performance, visitor surveys etc)	Use robust evidence to underpin marketing, development and funding bids	All Markets
Digital First	Develop digital expertise across the public sector partners identifying opportunities for destination marketing	Identify international best practice in digital delivery of marketing and experience development	Showcase Sussex as a digital tourism leader and strengthen innovation in collaboration with Universities	Buzzseekers Free & Easy Mini Breakers
Business Tourism Development	Agree MOU for all Sussex Destinations to collaborate in MICE marketing and identify lead delivery partner	Seed fund Pan-Sussex MICE marketing including participation at major industry events and sector marketing	Evaluate and monitor business tourism performance. Develop the capabilities of venues across Sussex	MICE/ Business Tourism Markets



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