

SPRING 2022

Sussex Visitor Economy

POSITION STATEMENT

INTRODUCTION

A new collaboration for the Sussex visitor economy has been initiated in response to the impact of the pandemic, underpinned by a recognition of the opportunities that cross-county working brings to support recovery and future growth of the sector.

Those in the industry are all too aware of the impact of COVID-19. Between 2019 and 2020 inbound visits to the UK declined 73%. Visit England's Annual Visitor Attractions Survey for 2020 shows a 65% drop in visitors overall and a 55% decline in revenue. Over a third (35%) of tourism businesses have seen their turnover fall by 50% or more, the highest of any economic sector. In 2019, business visits accounted for 21% of all inbound UK visits, with meetings, incentives, conferences and events (MICE) representing nearly a third of business visit spend, but the sector has lost ground as a result of the pandemic. This national picture has largely been echoed in Sussex, which pre-COVID saw 62 million visitors a year creating £5bn of impact and supporting 74,000 FTE jobs.

THE PROPOSITION

As we emerge from the impact of a worldwide pandemic, a new collaboration for the Sussex visitor economy is taking shape in recognition of the considerable opportunities cross-county working will bring to support the sector's recovery and sustainable growth.

Sussex offers a rich and varied visitor experience including distinctive attractions and places which set us apart from our competitors. Market insight tells us we have an opportunity to significantly increase our market share of longer staying domestic and overseas visitors by working together in a stronger joined-up approach across Sussex.

We need to define the key market segments that Sussex should target and craft a compelling

shared Sussex story and identity. To stimulate a step change in Sussex MICE development, we propose establishing the Sussex meeting, incentive, conference and events proposition, and we will also advocate for Sussex within the sector and with national bodies.

Brighton & Hove City Council, East Sussex County Council and West Sussex County Council have been at the forefront of this initiative, working with other partners across the county to progress the work. The partners are now seeking wider engagement across the sector to provide market and strategic insight and advice, as we work towards formally establishing a Sussex Visitor Economy Advisory Board.

What is the Sussex opportunity?

The combination of striking coastal scenery, beautiful rural landscapes, vibrant resorts and historic towns provides a rich and varied experience for the Sussex visitor. Sussex is a known brand for consumers, but we lack a compelling Sussex story to fully engage market interest. The "Brighton Brand" resonates across the UK and internationally but is often not connected by visitors to the surrounding places. There are some experiences that are unique, including our vineyards and cultural attractions, and we could make much more of them to draw visitors to the area.

The data points to the scale of the opportunity:

Staying visitors (UK + overseas) account for 11% of visits and 50% of visitor spend.

Overseas staying visitors account for just 2% of visits but 19% of spend.

Overnight business tourism trips represent 11% of total staying trips across Sussex.

The average spend per day by day visitors and per trip for UK and overseas visits is below the England average.

Despite this picture, the economic impact of Sussex tourism economy pre-pandemic was close to two thirds of that of Wales and one third of that of Scotland. We have an opportunity to increase our market share of longer staying visitors and overseas visitors by working better together across Sussex. This approach needs to be built on 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.

Brighton ranks 15th in the UK for corporate and national association meetings and is the most successful of the UK's coastal resorts. Brighton and Eastbourne are the principal destinations for the conference market in the county and many venues and hotels offer meeting rooms and conference facilities across Sussex.

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

A better joined up approach across Sussex provides the opportunity to:

Create and promote a stronger Sussex narrative at national and international level.

Campaign in the right places to attract the best value market segments.

Collectively plan for and factor in current and future challenges, offering flexibility in a changing environment.

Bring added value above the activities already undertaken by local destination management organisations and partnerships.

Secure greater inward investment through increasing economic impact and enhancing the quality of jobs in the sector.

What are we focussing on initially?

From analysis of market trends, feedback from Visit Britain, and insight into what our competitors do well, we have agreed what we need to do first:

Market Segmentation & Sussex Story Development

- Define the key market segments that Sussex should target in the short and medium term to ensure sustainable tourism growth based on high spend, and high value products.
- Create a compelling Sussex story and identity, better equipping us to take Sussex to the national and international markets.
- Work collaboratively with the Lewes District Council UK Community Renewal Fund delivery partners who have secured £705k towards investing in high-value and sustainable wine and cultural tourism to inform pan-Sussex growth as part of global Britain.

Sussex MICE development to stimulate a step change in our investment proposition

- **Set out the Sussex meeting, conference and events proposition through a product audit to establish opportunity.**
- **Create an identity for the Sussex proposition, enabling us to effectively promote the Sussex offer to conference organisers and agencies.**
- **Use the Sussex-wide visitor offer and story to create a point of differentiation between seemingly similar destinations.**

Increase the Sussex positioning in the sector and with national bodies

- Respond to business and stakeholder appetite for a joined-up approach across Sussex, expressed through the Sussex sector webinars at the height of the COVID-19 crisis.
- Subject to government's response to the DMO review, work with partners across the county to seek to position and align Sussex with the review recommendations, which includes the development of regionally organised and stronger partnerships among the public, private and community sectors.
- Position the Sussex proposition with Visit Britain/Visit England, including through bidding for new funding sources which might include DCMS or VisitBritain (following the DMO review), or other government funds, and lobbying for Sussex with key influencers.

Who is making this happen?

Brighton & Hove City Council, East Sussex County Council and West Sussex County Council have been driving this work, initially at the request of the Sussex Resilience Forum and now as a shared objective to do what we can to enable sector recovery and growth. The three authorities have been working with other partners to progress the work, including the South Downs National Park Authority, Experience West Sussex, Visit Brighton, Visit 1066 Country and Visit Eastbourne. This group fully acknowledges the role and contribution of a broad range of local destination arrangements across the area.



The strategic framework for the Sussex Visitor Economy Initiative has been informed by a commission which produced an evidence baseline, a vision and medium-term actions. The reports are available to **download**.

Having done the groundwork, the partners are now seeking wider engagement from the sector to sense check work to date, provide market and strategic insight, and to advise on next steps. The ambition is to initiate a series of large-scale pieces of work to increase the economic value of tourism across Sussex by attracting new funds, targeting specific market segments and enabling effective collaboration between businesses who share a common interest. The Sussex Visitor Economy work is not about replacing local tourism initiatives; it has an outward focus on national and international tourism.

Initially, we will host a meeting of invited industry representatives, and will then engage more widely with the sector and work towards formally establishing an Advisory Board. The Chief Executives of Brighton & Hove City Council, East Sussex County Council and West Sussex County Council have invited a respected Sussex leader to Chair the Board for the first twelve months.

CONTACT

For further information on the Sussex Visitor Economy initiative, please email info@sussexvisitoreconomy.org