

1. Background Information

The *Sussex Tourism and Culture Recovery Group* (STCRG) was established in Sep 2020 at the instruction of the Sussex Resilience Forum (SRF). It is made up of the South Downs National Park (SDNP); Brighton and Hove City Council (BHCC) including Visit Brighton; West Sussex County Council (WSCC) including Experience West Sussex; and East Sussex County Council (ESCC), Visit Eastbourne and Visit 1066 Country.

The group was tasked with supporting the economic recovery of the Tourism and Cultural sectors through pan-Sussex working. The role of the group is to support the work of existing Destination Management Organisations (DMOs) and destination marketing organisations by identifying what added value a pan-Sussex group can uniquely bring to the table.

This briefing updates Team East Sussex on progress to date and next steps for the STCRG. A more detailed report was presented to the ESCC Lead Member for Economy on 12 Nov 2021, and is available to view [here](#).

2. Sussex Visitor Economy Report

In Feb 2021, Blue Sail Consulting was appointed by the STCRG to produce an evidence base to inform a medium-term action plan and long-term vision for the Sussex visitor economy, shaping the proposal for future collaboration between East Sussex County Council (ESCC), Brighton and Hove City Council (BHCC) and West Sussex County Council (WSCC). The objectives of the consultancy were to:

- Develop a robust visitor economy evidence base for Sussex which informs the development of a shared ambition and vision, supporting continued and accelerated economic recovery of the tourism industry.
- Analyse the evidence base created, identifying ways to improve awareness of the county as a national and international culture, leisure and business visitor destination.
- Create recommendations which clearly identify and articulate the areas of the Sussex-wide visitor economy that would benefit from investment, giving a clear rationale which can be used to inform and substantiate bids for external funding.

In line with the evidence base, Blue Sail Consulting submitted their findings and recommendations in Jul 2021. The headline findings from the evidence base include:

- £5 billion of impact and 74,000 FTE jobs – the same size as Iceland’s tourism economy and two thirds that of Wales.
- 62 million 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 were just not aware they had been in Sussex.
- 96% of visitors and 84% of non-visitors think Sussex offers what they are looking for.

Having analysed the evidence base, Blue Sail Consulting produced a Vision and a series of recommendations for action:

- Proposed Sussex Visitor Economy Vision for 2030:

“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.”

- Sussex Visitor Economy Report recommendations:

The medium-term actions that will make a difference for Sussex fall into two distinct areas: ‘Market Focus and Positioning’ and ‘Experience Development and Underpinning Foundations’.

Four key target markets have been identified which are most appropriate to Sussex and have the strongest growth potential in the UK and internationally: ‘Country Loving Traditionalists’; ‘Free and Easy mini-breakers’; ‘Explorers’; and ‘Buzzseekers’.

3. Leadership

The STCRG is creating a Sussex Tourism Leadership Group (STLG) to drive the Vision and reach the target markets identified in the Sussex Visitor economy report. The group will:

- Focus on the big picture, tackling issues and opportunities that are truly pan-Sussex.
- Advocate for infrastructure which supports pan-Sussex Tourism.
- Operate at a national level, influencing Government and the private sector to invest in Sussex.
- Fundraise, using the strength of a pan-Sussex partnership to leverage and bid for funds to deliver additional activity.
- Facilitate and coordinate, working with Destination Management Organisations (DMOs) and existing tourism partnerships.
- Operate flexibly, to respond to changing circumstances, needs and opportunities.

Members to be invited, building upon their initial contribution to the baseline data, will include Visit Britain; county/unitary councils and one district/borough local authority senior representative (one each for East and West Sussex); South Downs National Park Authority; Coast to Capital and South East Local Enterprise Partnerships; Gatwick Airport; Sussex Modern; representation from private sector businesses aligned to the Vision and identified target markets in consultation with the Chair (e.g. Wine GB); Transport for the South East (Board level); Southern Rail/Govia Thameslink Railway and one major player in the meetings, incentives, conferences, and exhibitions (MICE) arena; Visit Brighton; 1066 Country; Visit Eastbourne; Visit Chichester; and the Experience West Sussex partnership.

4. Next steps

In light of the impact of the Covid-19 pandemic on the tourism sector, the pan-Sussex group is meeting a need to support the economic recovery of the Tourism sector through pan-Sussex working. To inform the proposals for next steps, the STCRG has considered:

- the recommendations from the Sussex Visitor Economy Report;
- the need for a wider leadership group to include public and private sector representatives; and
- wider strategic intelligence (see the full ESCC Lead Member Economy report).

Next steps will include:

- i. STCRG to create a STLG to drive the vision and reach the target markets.
- ii. STCRG Sussex Visitor Economy report recommendations and actions implemented.
- iii. STCRG to explore funding opportunities.