

Brighton & Hove City Council

Cabinet

Agenda Item 155

Subject: Visitor Economy Strategy for Growth 2024 - 2034

Date of meeting: 13 February 2025

Report of: Cabinet Member for Culture, Heritage and Tourism

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Ward(s) affected: (All Wards);

Key Decision: Yes

Reason(s) Key: Is significant in terms of its effects on communities living or working in an area comprising two or more electoral divisions (wards).

For general release

1. Purpose of the report and policy context

- 1.1 This report seeks approval from Cabinet for the Sussex Visitor Economy Strategy for Growth 2024 – 2034.
- 1.2 Delivery of the Strategy will support a diverse and sustainable city economy, contributing to the Brighton & Hove Council Plan (2023 - 2027) outcome of 'A city to be proud of', contributing to the delivery of 'A world-leading creative destination worthy of the UK's best small city' specified in the BHCC Economic Plan 2024 – 2027.
- 1.3 The development of the Sussex Visitor Economy Strategy for Growth 2024 – 2034 underscores the region's commitment to the devolution agenda. It highlights the strength of the existing public-private sector collaboration and amplifies a unified 'one regional voice', highlighting the importance of the visitor economy in the evolving Sussex Mayoral Strategic Authority, driving forward the area's economic ambitions.
- 1.3 The visitor economy plays a pivotal role in the vibrancy and economic vitality of the city and the region. It stimulates local economies, generating employment and provides meaningful, regenerative experiences. It ensures the region thrives year-round, sustaining our communities and regenerating our environment.

2. Recommendations

- 2.1 That Cabinet approves the Sussex Visitor Economy Strategy for Growth 2024 – 2034 (Appendix 1).

3. Context and background information

- 3.1 The visitor economy sector is of vital importance to Brighton & Hove. In 2023 the sector generated £1.28 billion in value and nearly 24,000 full-time equivalent jobs (approx. 16% of all employment) with 10.2 million day trips and 1.6 million staying trips (Economic Impact Assessment of Tourism, 2023). Sussex welcomes 62 million visitors per annum who create £5 billion of economic benefit, supporting 74,000 jobs, 14% of all employment. (Economic Impact of Tourism Reports 2019).
- 3.2 Pan-Sussex visitor economy collaboration began during the pandemic when the Sussex Visitor Economy Initiative and Industry Group (SVEIG) was initiated between Brighton & Hove City Council (BHCC), East Sussex County Council (ESCC) and West Sussex County Council (WSCC) to aid the recovery of the sector. The SVEIG brought together VisitBrighton, Experience West Sussex, local destinations and industry representatives to work collaboratively, producing the Sussex Visitor Economy Vision and Medium-Term Action Plans 2021 (Appendix 2), supported by a Sussex Visitor Economy Baseline Report 2021 (Appendix 3).
- 3.3 In 2023 the Local Visitor Economy Partnership (LVEP) programme was introduced by VisitEngland to reshape destination management across England, reducing fragmentation and bringing coherence to its Destination Management Organisation (DMO) landscape with the aim of creating a national portfolio of strategic and high-performing LVEPs working in collaboration locally, regionally and nationally on shared priorities and targets to support and grow the visitor economy. Through the programme, LVEPs can participate in VisitBritain initiatives, apply for any relevant VisitBritain/VisitEngland grant funding and benefit from a nationally recognised official status.
- 3.4 In March 2023, Brighton & Hove City Council (BHCC) submitted an expression of interest to become an LVEP on behalf of BHCC, East Sussex County Council (ESCC) and West Sussex County Council (WSCC). In November 2023 a full application was made. The application included a draft Sussex Visitor Economy Strategy for Growth, which was developed and consulted on throughout 2023; this was a mandatory requirement of the application.
- 3.5 The LVEP accreditation was approved by VisitEngland on 18th January 2024 with BHCC named Accountable Body for the East Sussex, Brighton & Hove and West Sussex LVEP with BHCC hosting a LVEP Project Officer, co-funded by BHCC, ESCC, WSCC to deliver on the partnership. The SVEIG Board transitioned to become the interim East Sussex, Brighton & Hove and West Sussex LVEP Advisory Board with a 12 month term of office prior to recruitment to the permanent LVEP Advisory Board in February 2024 (Appendix 4). Specific conditions were attached to the approval which included finalising the Sussex Visitor Economy Strategy for Growth. This condition was met with a final draft Strategy submitted in June 2024, which was accepted by VisitEngland.

3.6 What the Strategy will achieve:

- 3.6.1 The Sussex Visitor Economy Strategy for Growth demonstrates how collectively as a region we can grow the visitor economy in Sussex from £5 billion in 2024 to £7.5 billion by 2034. It will also ensure tourism does more for the local communities: improving the productivity in the local economy, contributing to the vibrancy of places and the potential of inward investment, growing foreign earnings, building a resilient sector, and providing rewarding employment opportunities.
 - 3.6.2 It will strengthen public-private sector partnership arrangements to provide leadership and management of the Sussex visitor economy in the evolving Sussex Mayoral Strategic Authority, driving forward the area's economic ambitions.
 - 3.6.3 It will help shape and deliver national strategy and activities through enhanced strategic relationships with VisitEngland, Department for Culture, Media and Sport (DCMS) and wider government.
 - 3.6.4 It will influence the delivery a high-quality tourism infrastructure and enhance visitor experiences and develop the visitor experience to strengthen the appeal and distinctiveness of Sussex.
 - 3.6.5 It defines sector focus on key leisure markets which will deliver sustainable growth, including the United Kingdom, Canada, China, France, Germany, Norway, Sweden, The Netherlands and USA,
 - 3.6.6 It aims to increase numbers of high spend business tourism visitors, by working collaboratively across the LVEP region and with national stakeholders, including VisitBritain, to reach international meetings, incentive travel, conference and events (MICE) buyers to create a better balance of tourism year-round and increased economic return.
 - 3.6.7 It looks to support sector transformation to a more sustainable, accessible and inclusive model, ensuring all visitors can access, fully participate in and enjoy opportunities and activities when visiting Sussex.
 - 3.6.8 The Strategy aims Improve strategic channels of engagement and information sharing with visitor economy stakeholders, developing a pan-Sussex hub for industry B2B communications and establishing a data and insights programme.
- 3.7 Annual priorities will be agreed with the LVEP Advisory Board and with the Sussex destination partners, providing opportunities to collaborate, to be responsive to and access funding opportunities, and collectively deliver the aims of the Strategy.
- 3.8 Strategy Development:

Timeline	
May 2023	Tender issued for appointment of consultants to create an evidence base, carry out consultation and deliver first draft of Strategy
July 2023	Blue Sail (BS) appointed
	BS update Sussex Visitor Economy Baseline Report 2021, creating Sussex Visitor Economy Baseline Report 2023 (Appendix 4) to inform development of the Strategy
Sept 2023	BS carry out workshops and consultation with sector stakeholders
Oct 2023	BS deliver draft Strategy
Nov 2023	ESCC, BHCC and WSCC review and comment on draft Strategy
Dec 2023	Draft strategy is submitted by BHCC to VisitEngland as part of East Sussex, Brighton & Hove and West Sussex LVEP Application
Jan 2024	LVEP accreditation awarded, contingent on delivery of final Strategy by July 2024
Mar-May 2024	Updated draft Strategy shared and comment sought from: <ul style="list-style-type: none"> • District & Borough Councils (Senior management; economic development/tourism) • Interim LVEP Advisory Board • Public and private sector partners, businesses and stakeholders of VisitBrighton and Experience Sussex • Sept 2023 workshop attendees • VisitEngland
June 2024	Feedback incorporated into final draft and shared with: <ul style="list-style-type: none"> • ESCC Director of Communities and Transport; WSCC Director of Place Services and BHCC Corporate Director of City Services • Interim LVEP Board (Signed off at Board Meeting on 9th July 2024) • VisitEngland
Sept – Nov 2024	Design and artwork finalised and signed off by LVEP Secretariat

3.9 Alignment with the BHCC Plan 2024 – 2027:

3.9.1 The Sussex Visitor Economy Strategy for Growth champions accessibility and inclusivity in the visitor economy, with a focus on regenerative tourism development, aiming to preserve local cultures and biodiversity while offering memorable, authentic experiences to our guests.

3.9.2 Four interconnecting priority pillars, each with key objectives, will be delivered through strong collaborative partnerships, with consideration for the needs of visitors, businesses, communities and the environment.

3.9.3 The strategy builds upon the work already being delivered by the Sussex-wide DMOs and Districts & Boroughs, recognising the role

and contribution of local destination arrangements. It's not about duplicating existing provision or replacing local initiatives: the current visitor market which includes day visitors, families and local visitors is already well catered for. Instead, the strategy focusses on identifying those markets with the best potential for growth and working collaboratively to raise the profile of Sussex as a domestic and international visitor destination.

3.9.4 The strategy will be delivered through stakeholder and partnership engagement. Partnership organisations, Destination Management Organisations, local authorities and business will all contribute towards its success with the LVEP Advisory Board will provide a monitoring and evaluation role for the Sussex Visitor Economy Strategy for Growth.

3.9.5 Strategy Priority Alignment with BHCC Council Plan 2023 – 2027:

LVEP Visitor Economy Strategy Priority	Action	Alignment with BHCC Council Plan 2024-2027
Incredible Experiences	Delivering high quality tourism infrastructure and developing the visitor experience to strengthen the appeal and distinctiveness of Sussex.	Outcome1 - A City to be proud of: <i>Investing in our City</i> • Develop Brighton & Hove as a place where people want to live, work and learn
Positive Impact	Advancing overall economic, social, and environmental worth of the visitor economy, supporting vibrancy of places and inward investment. Concentrating on visitor markets and audience segments able to deliver sustainable growth and bring benefits to local destinations. Promoting the quality, diversity and authenticity of what Sussex has to offer, attracting high value domestic and international audiences, including business meetings and events.	• Grow a diverse and sustainable city economy • Promote and protect what makes Brighton & Hove unique <i>An accessible, clean, and sustainable city</i> • Work towards carbon net zero • Protect and enhance the city's natural environment
Developing Innovation, Productivity, Accessibility and Sustainability	Delivering sector transformation through industry support programmes curated to ensure the sector is successful and resilient, the needs of potential visitors and visitors to Sussex are met and a world class welcome is created.	Outcome 2 - A fair and inclusive city: <i>An inclusive and fairer city</i> • Engagement and collaboration
Collaborative, Connected	Facilitating a connected ecosystem to stimulate innovation, creativity, and	• Fight discrimination and embrace diversity

<p>and Pioneering Sector</p>	<p>effective and efficient solutions: creating a tourism powerhouse of leadership, advocacy, fundraising and inspiration. Creating a coalition of willing stakeholders working together to deliver a world class destination experience, ensuring the warmest of welcomes for first time and repeat visitors across Sussex.</p>	<p><i>A city where people feel safe, included and welcome</i></p> <p>Outcome 3: A healthy city where people thrive</p> <p><i>Work with partners to deliver ambitious employment, training and apprenticeship opportunities</i></p> <ul style="list-style-type: none"> • Support the delivery of the City Employment and Skills Plan
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4. Analysis and consideration of alternative options

- 4.1 The Sussex Visitor Economy Strategy for Growth is essential for maintaining the East Sussex, Brighton & Hove, and West Sussex LVEP accreditation. Without this strategy, there is a risk that VisitEngland could withdraw the accreditation.
- 4.2 While Brighton & Hove City Council (BHCC) could create its own Visitor Economy Strategy for Growth specific to Brighton & Hove, this approach would involve significant costs and still fail to meet the requirements for the East Sussex, Brighton & Hove, and West Sussex LVEP accreditation. Without the Sussex-wide strategy, the LVEP accreditation remains at risk of being withdrawn by VisitEngland.
- 4.3 If BHCC opts not to support the Sussex Visitor Economy Strategy for Growth, it would jeopardise the East Sussex, Brighton & Hove, and West Sussex LVEP accreditation. Such a decision would also undermine BHCC's role as the accountable body for the LVEP.

5. Community engagement and consultation

- 5.1 Engagement in the development of this strategy included developing a Sussex Visitor Economy Baseline Report 2021 (Appendix 3), benchmarking performance against comparator destinations, developing a Sussex Visitor Economy Baseline Report update 2023 (Appendix 5), examining the national, regional and local context, hosting workshops and gathering feedback and input from DMOs, local authorities, destinations, attractions, private sector stakeholders and the Sussex Visitor Economy Industry Group.
- 5.2.1 Summary of main themes arising from consultation:
 Collaborative Leadership and Governance
- Establishing an effective LVEP (Local Visitor Economy Partnership) with clear partner inclusion, representation of district needs, and defined governance roles

- Strengthening collaboration with local Destination Management Organisations (DMOs), authorities, and stakeholders, including cross-regional and international partnership

Strategic Planning and Implementation

- Developing a detailed action plan and timetable for implementing the strategy with clear steps, measurable targets, and funding approaches
- Ensuring alignment with existing local, regional, and national economic and sustainability strategies

Sustainability and Environmental Impact

- Enhancing sustainable transport (e.g., hydrogen buses, cycling paths) and promoting low-carbon tourism aligned with climate goals
- Introducing sustainability certifications tied to UN SDGs and biodiversity offsetting strategies to mitigate international tourism emissions

Branding and Identity Development

- Creating a distinctive Sussex brand highlighting its unique assets, such as wine tourism, UNESCO Biosphere links, and cultural diversity
- Incorporating localised examples and storytelling to make Sussex's offer compelling and authentic

Infrastructure and Accessibility

- Improving tourism infrastructure, including transport connections, accessible accommodations, and high-quality public amenities
- Emphasising national goals for inclusivity

Economic Growth and Financial Sustainability

- Emphasising economic impacts, job creation, and inward investment through the visitor economy
- Exploring sustainable funding models, such as Accommodation BIDs, to secure long-term financial viability

Workforce Development

- Addressing workforce sustainability through skills development, high-quality jobs, and alignment with the City Employment & Skills Plan
- Enhancing sector value by investing in training and supporting tourism as a career pathway

Promotion and International Visibility

- Increasing international reach through collaborative trade show representation and marketing at key entry points like London Gatwick Airport and Newhaven Harbour
- Leveraging UNESCO clusters and cross-regional partnerships for greater international appeal

Visitor Experience and Product Development

- Developing bookable experiences integrated with private platforms (e.g., Airbnb, Booking.com) to modernise offerings.
- Catering to diverse visitor demographics while balancing high-value and off-peak visitors

Data and Metrics

- Incorporating post-pandemic data to reflect current economic and visitor profiles accurately
- Establishing measurable goals and costed plans for visitor growth, spend, and sustainability targets

Technology and Innovation

- Embracing emerging technologies, such as AI, digital platforms, and apps, to enhance visitor experiences and marketing efforts
- Creating place-based tools to modernise destination promotion and engagement

Terminology and Accuracy Updates

- Updating references (e.g., replacing "AONBs" with "Protected Landscapes") and removing mentions of inactive entities like Experience West Sussex.
- Ensuring all links, terminology, and statistics are current and accurate

All feedback from consultation was considered by the LVEP Secretariat and Board and incorporated into the Strategy where appropriate.

6. Financial implications

- 6.1 There are no direct financial implications arising from the recommendations of this report

Name of finance officer consulted: John Lack Date consulted: 23/01/2025

7. Financial implications

- 7.1 There are no direct legal implications arising from the recommendations of this report

Name of finance officer consulted: Siobhan Fry Date consulted: 28/01/2025

8. Equalities implications

- 8.1 A key objective of the Strategy is to support sector transformation to a more sustainable, accessible and inclusive model. Working with relevant partners and stakeholders to advocate for and improve accessibility and inclusivity, sharing best practice and training with the visitor economy sector All visitors can access, fully participate in and enjoy opportunities and activities when visiting Sussex

- 8.2 This is a countywide strategy. Monitoring activity and evaluation will be appropriate and proportionate to the capacity of the LVEP and the various partners.

9. Sustainability implications

- 9.1 The Strategy will contribute towards the City Council's ambitions in response to the climate crisis with a key objective being to support sector transformation to a more sustainable, accessible and inclusive model. By 2034 the Strategy aims for Sussex to be recognised across England as a role model in sustainable and regenerative tourism.
- 9.2 To attain these outcomes, the Strategy plans to advance the overall economic, social, and environmental worth of the visitor economy. This re-prioritisation will alleviate the challenges posed by volumes of visitors.

10. Health and Wellbeing Implications:

- 10.1 None.

Other Implications

11. Procurement implications

- 11.1 There are positive social value implications as the sector directly impacts communities, local culture, and the environment.
- 11.2 The visitor economy supports 16% of all employee jobs in Brighton & Hove, a significant portion of the local population, including young people, women, and marginalised groups. By creating jobs and supporting local suppliers, the sector delivers economic and social benefits.
- 11.3 Businesses engaged in the visitor economy often have strong ties with the local community, promoting the region's culture and heritage, fostering a sense of pride and identity, as well as supporting local businesses.

12. Crime & disorder implications:

- 12.1 None.

13. Conclusion

- 13.1 Cabinet is asked to approve the Sussex Visitor Economy Strategy for Growth 2024 - 2034.
- 13.2 By approving the Sussex Visitor Economy Strategy for Growth, the Council is providing leadership and acknowledging the shared effort and commitment of partners from across the public and private sectors to support and grow the visitor economy.

Supporting Documentation

1. Appendices

1. Sussex Visitor Economy Strategy for Growth 2024 – 2034
2. Sussex Visitor Economy Vision and Medium-Term Action Plans 2021
3. Sussex Visitor Economy Baseline Report 2021
4. LVEP Advisory Board Composition
5. Sussex and Brighton & Hove Visitor Economy Baseline Report update 2023