

Visitor Economy Task & Finish Group Scoping Report

Membership: To be confirmed by Place O&S Committee.

Terms of Reference: ToR to be agreed by Place O&S committee (see appendix).

Background context

Tourism is extremely valuable to the UK economy, creating thousands of jobs and bringing in billions of tax revenue that helps to fund public services. Tourism's GDP impact in the UK totalled £147 billion, or 5% of the national economy, in 2024.¹ The tourist industry includes both inbound tourism and domestic tourism. Inbound tourism is the spending of international visitors in the UK, and domestic tourism refers to UK residents visiting other parts of the UK including both overnight and day trips. According to VisitBritain, in 2024, domestic overnight visitors spent an estimated £33 billion and domestic day trip spending contributed £56 billion, bringing the total to £89 billion². However, domestic overnight spending has decreased by 9% since 2022 which could be attributed to the high cost-of-living, changing travel preferences and competition from international destinations. In comparison, spending from day trips have increased significantly. In general, overnight visitors will spend around 9 times more than day trippers due to paying for accommodation, more meals, local transport and activities in the area.

Brighton & Hove, although not seen as one of the large tourist cities like London, Edinburgh or Manchester, attracts over 11 million trips generating nearly £886 million of spending in the city³. Brighton & Hove benefits from its proximity to London and Gatwick Airport; it has good train and road connections that makes it easy to visit for the day; the beach, culture, shopping in the Laines, events, easy access to the South Downs and iconic attractions such as the pier and the Royal Pavilion make it a positive visitor destination.

Brighton & Hove is seeing a decline in the number of overnight visitors, both domestic and inbound. While there is some seasonality, with fewer day visitors during the winter months, this decline is less pronounced than in other seaside resorts, such as in Cornwall. Although the city is often viewed as a coastal destination, it continues to attract visitors year-round due to its strong offer of shopping, dining, and nightlife.

The Brighton & Hove Visitor Economy Strategy 2018-2023 states that "Brighton & Hove should focus on attracting higher-spend, year-round overnight visitors – both business and leisure – who will visit on weekdays as well as at weekends."⁴

The Issue: Visitor Economy

In December 2025, Full Council approved a Notice of Motion⁵ that recognised Brighton & Hove's successful visitor economy but also noted areas of potential growth, particularly in encouraging more visitors to stay overnight and visit during the winter. These will be the areas of focus for this Task & Finish Group.

Nighttime economy

Brighton & Hove attracts high day visitor numbers, but it would benefit from converting these into more overnight stays to encourage spending in the hospitality sector. The council ran a

¹ [Economic Value of Tourism | VisitBritain.org](https://www.visitbritain.org/en/insights/economic-value-of-tourism)).

² [Economic Value of Tourism | VisitBritain.org](https://www.visitbritain.org/en/insights/economic-value-of-tourism)

³ [Microsoft Word - Brighton & Hove Visitor Economy Strategy.docx](#)

⁴ [Microsoft Word - Brighton & Hove Visitor Economy Strategy.docx](#)

⁵ [63 Winter Economy LG Amendment.pdf](#)

survey in early 2025 asking for people's views on the nighttime economy; the city was praised for its diverse range of venues, entertainment options, the LGBTQ+ scene and vibrant culture. Repeated concerns were raised around safety at night, including excessive alcohol consumption, anti-social behaviour, a lack of street lighting and inadequate late night transport services⁶. More visible policing, the provision of safe spaces, and improved training for venue staff were identified as positive measures. Night-time safety is a key consideration for the visitor economy, particularly during the winter when longer hours of darkness mean visitors must feel safe to stay overnight or visit during this time. The city has a reputation for being a "party town" which might put off the higher value overnight visitors who would tend to spend more for a city break than one night out. This creates a tension when promoting the city especially when considering changing drinking habits and demographics of the city.

Respondents to the survey felt that the current regulatory framework for licences was too restrictive for small businesses, particularly the Cumulative Impact Zone (CIZ) and that the policies did not reflect the changes in culture towards less alcohol consumption⁷. There was a call for more flexibility in licensing policies and stronger penalties for those who are in breach of their license. The council made subsequent changes to its licensing policy in late 2025.

Alcohol-led businesses are facing increasing challenges due to rising operating costs, declining attendance at nightclubs and pubs, and a broader cultural shift away from alcohol consumption among younger people. In a city with two universities, changing student attitudes are having a noticeable impact; as of 2025, more than a quarter of students report not drinking alcohol, a figure that has nearly doubled since 2017⁸. A significant contributing factor is the cost of living crisis, alongside alcohol taxation, both of which have driven up costs for pub landlords and, in turn, increased prices for customers. In response, venues need to adapt their business models and diversify their offer to remain relevant. There is currently limited provision in the city between the closure of daytime venues, such as cafés around 4pm, and the opening of evening entertainment, such as theatres, from around 7pm. As a result, people often spend this period in pubs. However, given changing drinking habits, introducing alternative activities during this gap could encourage visitors to remain in the city for longer. There have been attempts to diversify beyond a drinking-focused offer, such as the White Night arts festival, but this was discontinued due to issues with antisocial behaviour.

Visitors are more likely to stay overnight when there is engaging evening activity, something worthwhile to experience in the morning, and when they feel that their stay is both convenient and good value.

Winter economy

Brighton & Hove is a popular tourist destination but less successful as a winter and Christmas destination where it experiences a seasonal drop in tourist demand. The weather is often poor during the winter with strong winds and rain making a seaside trip unattractive and affecting outdoor activities such as Christmas markets. Brighton & Hove offers a wide range of events and activities during the summer which draws visitors into the city; such as the Brighton Festival, Brighton Pride, the London to Brighton Bike Ride, and "On the Beach" festival. In previous years, the city used to offer popular winter attractions, such as Christmas markets and "Burning of the Clocks" but these have not taken place over the last few years. The most consistent outdoor offering for the winter is the ice rink at the Royal

⁶ [Appendix 2 Your Voice Survey Responses.pdf](#)

⁷ [Appendix 1 Summit Survey Responses.pdf](#)

⁸ [University, alcohol and mental health | Mental Health Foundation](#)

Pavilion which will need to move location in 2026 due to the restoration of the Pavilion Gardens. This could have a negative impact on the city's winter economy.

While Brighton's city centre is decorated with Christmas lights to create a festive atmosphere, the display has remained largely unchanged for several years, and public opinion on its quality is mixed. In contrast, Hove receives little to no festive decoration⁹, which is likely due to Brighton's Christmas lights being funded by local Brighton businesses, but this could be expanded into Hove should the local businesses be willing to contribute.

The Administration's *Brighton & Hove Economic Plan* states that the council will "develop an ambitious major events calendar to include a diverse range of festivals and events throughout the year," with the aim of increasing visitor numbers during the winter months. However, the hospitality sector continues to face economic pressures during this period, with lower income coinciding with higher operating costs, such as energy bills. As a result, some venues reduce their operating capacity and staffing levels, an important consideration if the council seeks to attract more visitors during the winter season.

Day visitors and conference tourism account for the strong performance of tourism in Brighton & Hove¹⁰. This could be an area of considerable growth for the city since conference tourism is all year-round including weekdays and brings in a lot of money. Visit Britain states that "tourism experts... have identified bleisure (business + leisure) travel, improved tourism infrastructure, and leisure events as major opportunities for tourism growth in the UK over the next few years".

Other factors to consider that affect the visitor economy more generally are how the city is viewed by the public, the affordability and accessibility of local transport and parking, and the ongoing effects of Brexit on the food and drink industries. The hospitality industry is experiencing a 4.9% increase in costs for food and drink which inhibits employment. Brighton & Hove can sometimes appear unclear, with unclear wayfinding for visitors, as well as visible issues such as street drinking and homelessness. It is also perceived as more expensive than neighbouring areas, which may deter some visitors. The council has frozen parking charges and is keeping bus fares affordable, but these are also considered high in comparison to other cities in the South-East, making it unaffordable for some people to travel.

Potential areas of enquiry:

Nighttime economy

- To investigate reasons why visitors don't stay overnight and what can be introduced to overcome these barriers
- What new ways are there to promote the city with a focus on nighttime
- What is the current offer for visitors at nighttime? How do you make nighttime activities more attractive to visitors so they choose to stay overnight? What lessons have been learned from previous activities?
- To look into more non-alcohol lead venues and activities, how might this look?
- To look at the availability and affordability of public transport late at night

⁹ [More winter events needed to attract tourists, councillors told – Brighton and Hove News](#)

¹⁰ [Microsoft Word - Brighton & Hove Visitor Economy Strategy.docx](#)

- To look at licensing for nighttime venues; understand the changes that were made, how effective has this been for businesses, has it made a difference to the nighttime economy?
- To investigate the issues of anti-social behaviour, street drinking and safety. What can be introduced to make this better?
- To look at what other cities have done to increase spending in their nighttime economy, was it successful?

Winter economy

- To investigate reasons why visitors don't visit in the winter and what can be introduced to overcome these barriers
- Why have recent winter events faced issues in the past and what can be learned from this?
- What kind of indoor activities are popular and can be built upon?
- What new ways are there to promote the city with a focus on winter time?
- How can the council support hospitality venues during off season months
- What is the offer for winter events? What's the plan moving forward?
- Can those activities that attract a lot of visitors be turned into an all year-round offer. What are they?
- What is the Christmas offer?
- Businesses in the Brilliant Brighton BID work hard to provide Christmas lights for the city centre, but could this be built on or changed? Could it be extended into Hove?
- What have other cities done to improve visitor numbers in the winter? Were they successful?

General

- What are the most popular things to do in the city and can this be built on?
- How can crime and antisocial behaviour be tackled to be more welcoming for visitors?
- What kinds of offers or deals encourage visitors to travel? What deals currently exist for taking public transport into Brighton? How effective are they?
- How can conference tourism be promoted all year round?
- Who are we targeting? Is there something we can do with Gatwick airport to help promote Sussex/B&H?

Potential witnesses:

- Licensing team
- Community Safety

- Public Health
- Events Team
- Cabinet member
- Businesses – pubs, clubs, restaurants, hotels, Pier
- BID
- Visit Brighton
- Other Councils (Bristol, York, Hull, Winchester, Preston?)
- Bristol Nights Project
- Operator (Bournemouth/Cambridge)
- Seafront Development Board
- Universities/colleges/Students' Unions
- Academics
- Event organisers e.g. The Dome, Same Sky, Brighton Festival, Brighton Centre etc
- Sussex Police
- Tourism Alliance
- Local Visitor Economy Partnership (Chair is Hedley Swain)
- Public transport providers – B&H Buses?
- Brighton & Hove Growth Board

