

Arun District Council

REPORT TO:	Economy Committee - 5 October 2023
SUBJECT:	Arun Visitor Strategy – 2023-2028
LEAD OFFICER:	Denise Vine, Group Head of Economy, Margaret Murphy, Tourism Development Officer
LEAD MEMBER:	Councillor Roger Nash, Chair of Economy Committee
WARDS:	All

CORPORATE PRIORITY / POLICY CONTEXT / CORPORATE VISION:

Improving the wellbeing of Arun:

Champion leisure, culture and the Arts in Arun and encourage our community to embrace healthy and active lifestyles.

Work with partners to provide advice, support and activities that promote community wellbeing where it will have the greatest impact

Supporting our environment to support us:

To consider climate change, sustainability, biodiversity, and the environment in everything the council is responsible for and encourage its community and local businesses to do the same

Make low carbon transport including walking, cycling, travel by public transport and electric vehicle easy, convenient, and pleasant and a fundamental part of our placemaking

Protect and enhance our natural environment.

Fulfilling Arun's economic potential

Increase opportunities for more high-quality, well-paid employment, encouraging more people to live, work, study and visit Arun.

Use regeneration opportunities to attract new and relocating businesses to the district.

Encourage the development of the district as a key tourist destination, supporting and enabling improvements and activities to increase visitor spend.

Make best use of our natural assets to help drive the economy.

DIRECTORATE POLICY CONTEXT:

The Council's Economic Development Strategy includes the following 'Building Blocks' and priorities:

Shaping our places for people to live, work and visit

Attracting investment and success giving businesses the space and support to grow and prosper

Putting people centre stage: healthy, happy, prosperous lives

A growing business population

FINANCIAL SUMMARY:

It is intended that the implementation of the strategy can be accommodated within existing allocated resources. In future financial years (2024/ 25 onwards) some one-off, specialist support may be required e.g., commissioned surveys and the monitoring of KPI indicators, and budget would need to be identified and agreed prior to work commencing. If the budget does not allow for specialist support spend, other in-house solutions will be investigated, or the decision made not to proceed with the relevant recommendations.

1. PURPOSE OF REPORT

To endorse the new Visitor Strategy for 2023 – 2028, and agree to adopt the strategy, its priorities and actions, and the recommendations below.

2. RECOMMENDATIONS

2.1. To endorse the new Visitor Strategy for 2023 – 2028

2.2 To support officers' delivery of priorities and actions as set out in the strategy.

3. EXECUTIVE SUMMARY

A recommendation was made in the "Arun District Tourism Review of 2020" to commission a new Visitor Economy Strategy for the district, and this was approved by the Economy Committee in August 2022. Consultants Blue Sail were commissioned in March 2023 to produce a strategy document for the next five years 2023 – 2028.

The new visitor strategy focuses on: "how Arun's visitor economy is managed, developed, and marketed so that growth benefits everyone – visitors, businesses, and communities. It states that Arun District Council can be most effective in supporting the growth of the visitor economy as a strategic enabler, working in partnership with stakeholders."

This report sets out the priorities and actions for the delivery of the Visitor Strategy 2023 – 2028 and is seeking the committee's support.

4. DETAIL

- 4.1 Recognising that the previous Visitor Strategy (2006 – 2011) needed to be updated and following a recommendation in the 2020 Arun District Tourism Review, a new Strategy was commissioned and completed by Blue Sail Consultants in the financial year 2022- 23.
- 4.2 Blue Sail have a thorough understanding of the Arun district's tourism offer, alongside those of our regional and national sector partners and were able to undertake data analysis of the current market and the hospitality sector to deliver the strategy document within budget and a tight timescale.
- 4.3 The new 2023 – 2028 strategy document includes in its introduction the statement: "Tourism and the visitor economy is important to the Arun District. 2.8m annual visits generate £247m of spend and support almost 4,000 jobs. Beyond the economic benefits, tourism enhances the image and reputation of Arun as a place to invest in, work and live. Visitors introduce vibrancy and support local businesses, events, and other facilities. For residents there is also a sense of pride in a place that attracts visitors and offers memorable experiences."
- 4.4 The new visitor strategy has been informed by the findings of the 2020 Arun District Tourism Review and includes the development of a concept 'destination narrative'. The strategy also considers the challenges posed by Brexit, Covid-19, and the rising cost of living and is intended to chart a way forward for the Arun district's visitor economy over the next five years. It draws on a robust evidence base and is informed by the views of partners, stakeholders, and businesses, as well as policy priorities at local, regional, and national level. It takes a market focus to identify where growth is likely to come from and how the sector can respond to market trends and demands. It also includes a Framework for Growth around three strategic pillars: destination management, experience development and marketing, setting the direction of travel for productive collaboration.
- 4.5 The document provides lots of background information on the district's tourism and hospitality offer and the existing healthy collaborative partnerships at town, district, county, region, and national level. It also provides an indication of how the sector is likely to develop over coming years, and how the Council and its Economy Team can continue to take advantage of collaboration with sector partners for economies of scale, shared skillsets and a shared 'Sussex narrative', to navigate current and future challenges in an ever-changing economic climate.
- 4.6 The district's markets, trends and growth opportunities have been identified and examined, during regular discussions held with the tourism officer and Economy Group Head as well as stakeholder consultation with some members, local hospitality businesses, regional tourism partners and members of the Arun Youth Council, resulting in the proposal of a series of recommended priorities and actions described in detail in the draft strategy document.

4.7 The Visitor Strategy document includes full details of priorities and associated 'Areas for Action', on pages 17 – 30. Brief details of each priority and its actions are laid out below for members' information:

4.7.1 **PRIORITY 1: SUSTAINABLE AND ACCESSIBLE TOURISM**

'Tourism contributes to climate change, but visitors and businesses can be encouraged to make changes which reduce the impact and maximise the benefits that tourism can bring.'

4.7.1.1. **PRIORITY 1: ACTIONS**

- a) Signpost and encourage businesses to existing guidance and resources to encourage action on reducing carbon impacts and growing accessible businesses.
- b) Encourage and inform visitors on sustainable ways to explore and experience the Arun District.
- c) Capitalise on current and future pipeline projects.
- d) Commission an audit of transport, green routes and electric vehicle charging infrastructure across the district.

4.7.2. **PRIORITY 2: VISITOR ACCOMMODATION DEVELOPMENT**

'The availability of quality and accessible visitor accommodation is a major issue, and the recent Tourism, Hospitality & Visitor Economy Study from Hotel Solutions and Tourism South East has demonstrated the market appetite for new products. Therefore, further proactive inclusive development is needed to respond to market opportunities.'

4.7.2.1. **PRIORITY 2: ACTIONS**

- a) Develop a visitor accommodation prospectus – identifying potential opportunity sites and making the case for investment
- b) Identify sites where the 56-day rule for temporary camping can be deployed (subject to planning and licensing permissions and current policies).

4.7.3 **PRIORITY 3: PARTNERSHIP AND COLLABORATION**

'Local visitor economy businesses have a growing appetite for working together, as evidenced by recent cross industry collaborations. Arun District Council can play a convening role in bringing local businesses and stakeholders together to collaborate on managing and developing the visitor offer.'

This is also a time of change in the provision of tourism services both regionally and nationally. Our partners at Experience West Sussex are working on a plan to form a new Local Visitor Economy Partnership (LVEP) framework for the whole of Sussex as a part of a central Government initiative for higher level destination support and marketing delivered via 'Visit England'. The Arun District would benefit from being a partner in this partnership and we are currently proactive in the project discussions.'

4.7.3.1. PRIORITY 3: ACTIONS

- a) Establish a local visitor economy business network as a forum for sharing expertise and encouraging joint working to develop the destination.
- b) Continue to support effective collaboration at local, pan-county, and national levels by maintaining close links with recognised sector partners and keep local partners and businesses updated on what proposed changes in tourism services mean for them.
- c) Subject to available resources, work with partners to commission and publish research among visitors and business that can act as both an engagement tool and industry planning resource. Suggestions for research and KPI monitoring measures are included in section 6 of the document.

4.7.4 PRIORITY 4: ARRIVAL, NAVIGATION & EXPERIENCE DEVELOPMENT

'Key destinations within the Arun District should be easy to access from main points of arrival (train, car, bus, foot, bike or even boat). Routes should be intuitive and designed to help a visitor with no previous experience of the area know where to go and how to move around easily and with confidence; and they should be well-maintained. Routes should also give visitors a reason to move around the district and overcome obstacles (real and perceived) in experiencing the area.'

4.7.4.1 PRIORITY 4: ACTIONS

- a) Support delivery of the Bognor Regis Wayfinding Strategy, including support for refreshed signage and street furniture. Support community engagement with public commissions for public art and by sharing updates on the project.
- b) Undertake an audit of wayfinding and key routes from main points of access in Arundel and Littlehampton. Apply relevant learning from the Bognor Regis Wayfinding Strategy to improve routes in these locations.
- c) Promote and support the continued development of accessible and inclusive walking and heritage trails for Arundel, Bognor Regis, and Littlehampton.

4.7.5 PRIORITY 5: ACTIVE

'Active and accessible experiences can be a strong driver of holidays and short breaks. The trend towards 'wellbeing' (physical and mental) continues to grow, as evidenced in post-pandemic behaviour. The Arun District is rich in opportunities for people to enjoy active experiences – on land and, increasingly, on water. Plans for the development of active and inclusive travel routes and the regeneration of Littlehampton seafront demonstrate both the appetite and support for expanding provision of active experiences. Making it easy for people to engage with Arun's green and blue spaces provides not only a way to support their wellbeing but can also showcase the district's sustainability and eco-tourism credentials, an inclusive visitor experience and the benefits of enjoying the natural world responsibly.'

4.7.5.1 PRIORITY 5: ACTIONS

- a) Work with West Sussex County Council (WSSCC) to bring to fruition the development of active travel routes as outlined in the West Sussex Transport Plan 2022-2036
- b) Progress the development of the River Arun Greenway Cycle Path alongside the River Arun between Arundel and Littlehampton
- c) Identify new commercial opportunities which can be accommodated at the Littlehampton Seafront development, and which are complementary to the existing water-based activities offer.
- d) Develop relationships with all commercial water activity providers across the district and encourage collaboration with other businesses – including hospitality – to create new experiences.
- e) Promote and market sites for investment in active experiences across the district.

4.7.6 PRIORITY 6: EVENTS

‘Events can motivate visits, raise profile, and positively shift perceptions of a destination. Events is a broad definition – some are of a scale and appeal to attract visitors; other smaller events may not have the same draw but are useful in animating the destination for visitors already there and residents alike. A year-round calendar of inclusive and carbon aware events for the Arun District will ideally comprise a few large unique ‘signature’ events (i.e., the Arundel Festival) and a range of smaller more locally orientated events.’

4.7.6.1 PRIORITY 6: ACTIONS

- a) Undertake an audit of public events across the Arun district to inform the development of a potential district-wide events strategy.
- b) Develop a toolkit for event organisers (commercial and community) and publish and promote this through the existing events pages of the Arun District Council and ‘Sussex by the Sea’ websites and social media.

4.7.7 PRIORITY 7: FOOD & DRINK

‘Eating and drinking is a key component of a trip and a great way to experience a destination. Arun has a wealth of quality food and drink businesses including microbreweries, local vineyards and independent pubs cafes and restaurants. With a strong local supply chain, food and drink is a key sector through which Arun (and Sussex more widely) can demonstrate its credentials in gastronomy and sustainability.’

4.7.7.1 PRIORITY 7 ACTIONS: FOOD & DRINK

a) Encourage opportunities for new food and drink outlets through temporary and 'meanwhile' or 'pop-up' catering outlets to showcase the quality of local food and drink (e.g., seafood)

b) To help them diversify their businesses, support vineyards and craft breweries etc in developing their visitor experiences. Advocate for and enable the implementation of the Sussex Wine Tourism strategy in the Arun District and support complementary activity in neighbouring areas.

4.7.8 PRIORITY 8: MARKETING & POSITIONING

'Following the 2020 review of tourism services, Arun District Council streamlined the Sussex by the Sea website to act as a destination marketing portal and commissioned town centre partners to deliver digital marketing content. Since the implementation of these changes, both audience reach, and engagement have grown markedly. Consequently, this strategy seeks to support the continued successful development of this way of working to attract those target audiences most likely to grow the Arun District's visitor economy over the next five years.'

4.7.8.1 PRIORITY 8 ACTIONS: MARKETING & POSITIONING

a) Align with and amplify partner marketing activity at a local, regional, and national level.

b) Nurture marketing partner relationships – continue to invest in marketing partnerships with the district's town website providers and West Sussex and regional partners and review how service level agreements are working effectively for both parties in each case. Facilitate connections between marketing partners and regional and local tourism services to share ideas, inspiration, and best practice. Support marketing partners in identifying and applying for funding to develop new tools and campaigns.

c) Develop a shared toolkit of resources – The development of a shared 'destination narrative' should align with how the towns and South Downs National Park (SDNP) are presenting themselves to the market and support the distinctive positioning of each of these locations. In parallel, a project to develop a destination narrative for Sussex at a pan-county level (SVEP) is now underway.

4.7.9 MONITORING PROGRESS

Suggested Key Performance Indicators (KPI) are included on pages 34 – 36 of the Visitor Strategy document and will be considered as part of an action plan to be developed. As mentioned in the Financial Summary, feasibility and costs of commissioning specialist research and surveys would need to be identified and agreed prior to any work commencing.

4.7.10 CONCLUSION

The new Visitor Economy Strategy 2023 – 2028 provides the Council's Economy Team with a vehicle to forward plan and deliver future development of a vibrant, but sustainable and accessible tourism sector to benefit the district's hospitality businesses, visitors, residents, and local communities.

5. CONSULTATION

To help inform the visitor strategy, Blue Sail Consultants consulted with a range of local hospitality businesses, industry specialists, members of the Arun Youth Council and several Councillors, through a combination of individual interviews and workshops in March 2023. A list of consultees is included on page 37 of the draft document.

Should the Strategy be endorsed, further consultation will continue. One of the suggested Priority Actions is to 'Establish a local visitor economy business network as a forum for sharing expertise and encouraging joint working to develop the destination'

We will also continue to consult with and work closely with tourism sector partners and relevant council departments to help deliver the actions during the life of the strategy.

6. OPTIONS / ALTERNATIVES CONSIDERED

- 6.1. To approve the vision, themes, priorities, and actions identified in the strategy and the preparation of an action plan.
- 6.2. To not approve the strategy.

7. COMMENTS BY THE GROUP HEAD OF FINANCE/SECTION 151 OFFICER

- 7.1 The financial implications arising from the proposals in this report will be funded from within the existing 2023/24 budget. Any future costs arising in 2024/25 onwards will also be funded within the existing base budget but if this is not possible, either other affordable solutions will be investigated, or the work will not proceed.

8. RISK ASSESSMENT CONSIDERATIONS

- 8.1 Potential risks to the suggested Visitor Strategy actions and projects might include:
- 8.2 Reduced Economy Team and other department staff time and resources
- 8.3 Unknown risks beyond our control e.g., partners' budgets, and resources.
- 8.4 Encouraging sustainable travel is currently challenging due to train strikes and cost of living etc

9. COMMENTS OF THE GROUP HEAD OF LAW AND GOVERNANCE & MONITORING OFFICER

- 9.1 There are no direct legal implications associated with this report.

10 HUMAN RESOURCES IMPACT

- 10.1 At this stage officers believe there are no direct Human Resources impact issues. If the proposals of the report are agreed by the Committee, and as work progresses, Human Resources Impacts will be reviewed for each project or workstream, where necessary.

11. HEALTH & SAFETY IMPACT

- 11.1 No additional health & safety impacts have been identified in relation to the proposals.

12. PROPERTY & ESTATES IMPACT

- 12.1 At this stage officers believe there are no direct Property & Estates impact issues. If the proposals of the report are agreed by the Committee, and as work progresses, Property & Estates Impacts will be reviewed for each project or workstream, where necessary.

13 EQUALITIES IMPACT ASSESSMENT (EIA) / SOCIAL VALUE

- 13.1 A link to an Equalities Impact Statement is provided below with the Background Documents. At this stage officers believe that if there are any Equalities Impacts arising from the priorities and actions described in the Strategy, they should be positive ones.

14. CLIMATE CHANGE & ENVIRONMENTAL IMPACT/SOCIAL VALUE

- 14.1 The visitor strategy will have a significant impact on sustainability within Arun, across numerous areas. It will therefore be important that sustainability is considered at every stage of this work and within each specific area. Support, guidance, and consideration specific to each priority area should be provided to ensure that there is as little negative impact as possible, and where needed specialist input and work will be undertaken, subject to available resources. Arun District Council has a 2030 carbon neutral target, and it will be essential that this is considered in all work that is undertaken.'

15. CRIME AND DISORDER REDUCTION IMPACT

- 15.1 Officers believe that there are no direct legal implications associated with this report.

16. HUMAN RIGHTS IMPACT

16.1 Officers believe that there are no direct legal implications associated with this report.

17. FREEDOM OF INFORMATION / DATA PROTECTION CONSIDERATIONS

17.1 Officers believe that there are no direct legal implications associated with this report.

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BACKGROUND DOCUMENTS:

[Draft Visitor Strategy document](#)

[One Page summary of the draft Visitor Strategy document](#)

[Equalities Impact Statement](#)

[Arun District Tourism Review 2020](#)