

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

STRATEGIC REVIEW OF TOURISM SERVICES

ARUN DISTRICT COUNCIL

SEPTEMBER 2020

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EXECUTIVE SUMMARY

Tourism is important to Arun. A major source of employment and part of what makes the district distinctive and an attractive place to live, work, study as well as visit. Tourism is in Arun's veins – you have, after all, been doing it for hundreds of years.

But while the nature, funding and role of local government has changed dramatically, while visitors today are very different to those of a decade ago, while some of your businesses have modernised and adapted to changing market demands, the types of services provided by the District Council to support tourism have remained largely unchanged for the last decade and more.

Combined with the challenges of Covid-19, this therefore is an ideal time to press 're-set' – to agree what needs to be done and why; and to decide who is best placed to deliver what.

Tourism done well is a force for good in Arun. It is able to support your local economy with jobs and income for local business; it can sustain that economy year-round; it should underpin and add to the qualities and assets that local residents admire and enjoy; it helps define what makes your district distinctive and compelling and that should have benefits beyond tourism – in inward investment, in attracting students and intellectual capital, and in attracting new residents.

We were asked to make strategic recommendation for the role that Arun District Council should perform in supporting tourism. But, as form follows function, it isn't possible to come to those conclusions without first addressing what the need is and what strategic approach is required. This therefore is not a destination strategy or plan – but we have looked at the destination through a similar lens allowing us to reach some swift conclusions about what you should be doing and therefore what that means for the District Council.

We have four recommendations for the District Council:

- ▶ **Strategic Tourism Investment Role** – this is natural territory for the Council with a strategic and operational focus. Strategically you want to secure investment in the District (accommodation, events, attractions, watersports) and operationally you need to 'show the way' in lifting the quality of the visitor experience (public realm, signage, beach management, toilets) and advocate for visitors across the public and private sector.

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- ▶ **A Refreshed Tourism Strategy** – prepare a new plan setting out clearly what you want to achieve as a destination and bringing focus and clarity to the actions that are needed. You can't do everything, given limited resources, so the plan will help you to be very targeted in choosing where to focus. It is also an opportunity to engage stakeholders more closely in the development and delivery of the strategy.
 - ▶ **A shared narrative** – develop thematic and town based narratives for all to use. To attract new visitors you need everyone involved in tourism saying the same messages in a similar way through all of their own marketing. But what is that narrative now and how do you address the differences between the towns? This isn't about a logo or even a brand identity – it is a richer seam of stories and narratives, images and ideas that everyone can use which highlight the 'very best' of the district. Work has recently been completed on what the Bognor Regis Place Branding 'narrative' should be. This wasn't just about attracting tourism visitors but broader themes of why people should visit, live and invest in the town. The town-based narratives should complement each other.
 - ▶ **Commission marketing support** – invest in the Experience West Sussex project to deliver regional campaigns that attract new visitors and work hard to get your fair share of that business. And invest in the information and marketing services in each of Arundel, Littlehampton and Bognor Regis.

All of this means that the council shifts from a tourism delivery (marketing, information) to a strategic commissioning, investment and development role – be clear about what you want to achieve and work through others, who are better placed, to deliver it in your visitor marketing. And use your influence (inside and outside the council) to improve the visitor experience – to make it as good as it can be now, and to secure the types of investment which will help the district build its visitor economy.

BACKGROUND

THE BRIEF

This project brief was for an independent review of the tourism service within Arun District Council and clear strategic recommendations for the council in delivering tourism services, to clarify what it should be doing and how that should fit with other organisations in the district that support tourism marketing, management and development.

The context for this work is important and includes:

- ▶ Recent county-led marketing efforts through Experience West Sussex activity
- ▶ Developing town-led website, promotion and information development in Littlehampton, Bognor Regis and Arundel
- ▶ Covid-19 implications for destination marketing and management
- ▶ Pressures on public finances within the local authority and increasing demand for statutory services

Our aim in this review is to provide a clear roadmap for Arun District Council in developing tourism to support wider strategic objectives for the district.

OUR APPROACH

As part of this project we reviewed publicly available reports and data including those from regional and national tourism bodies, we interviewed in excess of 20 key stakeholders and we looked at examples of best practice from other destinations.

It is clear that the question of 'role' is very difficult to address in the absence of a clear strategy for tourism. While this project is not about developing a tourism strategy or plan, we have looked at issues needed to develop a tourism strategy and our background papers and analysis will be relevant and useful in the development of such a strategy for the district.

This is a challenging time for tourism with Covid-19 in evidence and the implications that continues to have for everyone involved in tourism. While it presents some fundamental challenges for tourism, our recommendations will ensure Arun is best placed to rebound strongly from the current crisis.

This is not a time when resources are easy to identify for growth plans. Nonetheless our recommendations are ambitious and deliverable. They necessitate new ways of working, or partnership and collaboration. But done well and with energy, will leave Arun in a strong position from which to capitalise on the benefits to be derived from tourism.

WHERE IS ARUN NOW

CURRENT VISITORS

Tourism is important to Arun with 4m visitors producing £221m of direct spend and 4360 FTE jobs (5972 actual). This compares favourably to neighbouring districts, with values just below Chichester but ahead of Worthing and Adur.

Day visitors dominate, as they do with other destinations along the coast. You receive 3.43m day visitors compared to 0.61m staying visitors but while day visitors outnumber staying by 5.6 times, staying visitors spend more (£116m compared to £105m) illustrating the huge **importance of staying visitors**.

Among staying visitors it is notable how important overseas visitors are. While district level data is not available on international visits, Tourism South East have estimated overseas numbers through the Cambridge Model and suggests that they represent just 13.4% of all staying visitors but their spend is 31% of all staying visitor spend¹.

Around two-thirds of all overnight stays are for holidays and a third are visiting friends and relatives. Very few visitors are here on business (5%) and those that are will probably be because of some of the major local employers (Rolls Royce, Body Shop) and events held at Butlins.

These numbers are substantial, but what do we know about the people behind the numbers? The 2016 Tourism Research Project commissioned by Coastal West Sussex gives us useful insights. While it may be a few years out of date it is likely to give a reasonably accurate picture of Arun's three leading town destinations. Here's what it tells us:

- ▶ The market is very local - over 90% of visitors (day and staying) come from the UK, and most of them come from West Sussex, Surrey or Hampshire

¹ Economic Impact of Tourism on Arun District 2018, Tourism South East

- ▶ The family market is important for Bognor Regis and Littlehampton, and couples are more important for Arundel
- ▶ Arundel attracts more up-market types, while Bognor Regis and Littlehampton have more appeal to the mid-market
- ▶ Day visits dominate Arundel and Littlehampton, while over half of Bognor's visits are staying
- ▶ Littlehampton gets the longest stays at over a week, Bognor just under, and Arundel attracts short breakers
- ▶ Day visitors generally spend more than 5 hours
- ▶ Staying visitors use catered accommodation of all types in Arundel, Bognor features hotels and caravans/chalets while visitors to Littlehampton are considerably more likely stay with friends and relatives
- ▶ Most visitors (around two-thirds) are on a repeat visit.

Looking at what motivates and attracts visits, and what visitors associate with each town, there are clear distinctions in the towns' appeal:

- ▶ Arundel – Castle, history & heritage, eating & drinking
- ▶ Bognor Regis – beach and seafront, Butlins, family holidays and fun
- ▶ Littlehampton – beach and seafront, parks, gardens and open spaces, eating & drinking, summer holidays.

Arun is fortunate in providing a varied offer that includes coast, countryside, three very different towns and access to the South Downs National Park. However, with one or two exceptions, **much of the experience is 'adequate' rather than 'great'** and offers little that makes it stand out from many other destinations making it very difficult to compete for discerning visitors.

Tourism in Arun is also very seasonal. Although this is not uncommon in coastal destinations, this is a challenge for year-round employment and businesses having the resources to invest and maintain high standards.

ARUN DISTRICT COUNCIL TOURISM SERVICES

In Arun District Council the services supporting tourism are very traditional and largely unchanged over the last 15 years. ‘Sussex by the Sea’ (SBTS) is the brand identity adopted by the council for the promotion of tourism and has been in use since 1994. There is a tourism budget of £68,000 of which £38,000 is allocated to staffing. Of the remainder approximately half is spent on IT, website, brochure and occasional marketing activity.

The main activities are providing the website, some social media activity, a visitor guide, support for visitor information points and some occasional destination marketing.

The website (www.sussexbythesea.com) was developed in 2013, requires updating and options for a new site are being considered. In 2019 it received 144,000 page views, down from 195,000 the year before. The visitor guide is now produced every two years rather than annually and 100,000 copies of the most recent guide were produced. Visitor Information Points are run and supported by local organisations /partners in the main towns. Arundel Museum hosts a leaflet distribution display in the foyer, in Bognor Regis the Regis Centre/ Alexandra Theatre hosts the VIP and leaflets are also available via the seafront office, and in Littlehampton a range of businesses provide an informal VIP.

The tourism officer maintains and supports the Sussex by the Sea website, helps service the VIPs, responds to direct enquiries, supports events, works on collaborative activity e.g. 2021 Year of the Coast, promotes quality assurance, supports networks and training, manages brochure fulfilment, and works closely with partners such as Experience West Sussex.

There is lots of activity taking place, however there are questions about whether this activity is achieving significant impact and what is needed at this time. There is no evidence it is attracting new visitors, changing visitor perceptions or supporting the development of new tourism experiences.

CURRENT APPROACH TO MARKETING

There is quite a complicated promotional architecture for a relatively small area, which has developed over time. At each level there is at least a website, various social media channels and sometimes even a printed brochure. There is clearly duplication of resources, if not overlapping messaging. The four main ‘destinations’ are detailed below and the South Downs National Park and other significant attractions could easily be added to create a yet more complex picture.

Destination	Positioning	Channels
<p>Experience West Sussex</p> <p>Funded by partnership of local authorities and supported by the Coastal West Sussex Partnership.</p> <p><i>As the central voice for the region on tourism, destination management and the visitor economy, the Experience West Sussex Partnership delivers industry intelligence, local business support and creative marketing campaigns to attract visitors to the area.</i></p>	<p><i>One of the UK’s most diverse counties, West Sussex covers both coast and the South Downs National Park, encompassing hills, harbours, farmland and market towns. From stately homes to breath-taking beaches, West Sussex is bursting with inspirational things to do and see. Whether you’re looking for a coastal break, a relaxing weekend in the country or a jam-packed family holiday, we’ve got you covered.</i></p>	<ul style="list-style-type: none"> ▶ Website – well-presented, lots of practical info, placing the destination and giving ideas for what to do, Searchable database with listings for nine themes, with opportunities to filter by group, budget, location etc to refine the search. Good blogs, listicles and inspiration section ▶ Twitter (3, 300² followers) ▶ Facebook (34,000) ▶ Instagram (4,500) ▶ YouTube channel (only 9 subscribers)
<p>Sussex by the Sea</p> <p>Managed by Arun District Council</p>	<p><i>Between the South Downs and the sea.</i></p> <p><i>From things to do in Sussex with kids to tourist attractions and activities for groups, fun days out on England’s sunny south coast start and end in Sussex by the Sea! In Arundel, Bognor Regis, Littlehampton and surrounding areas you’ll find the perfect mix of activities to add to your holiday diary.</i></p>	<ul style="list-style-type: none"> ▶ Website – lacks strong district-wide distinctiveness or compelling sell. Focuses on the 3 towns and South Downs & villages. Themes are history & heritage, walk, cycle, horseriding (no info), beaches, parks & gardens, shopping. ▶ Brochure on request or e-guide. Presented by coast or countryside offer. Very family orientated.

² Numbers, rounded, at 9 July 2020

Destination	Positioning	Channels
<p>Arundel <i>Arundel's tourism information site</i></p>	<p><i>Arundel captures the essence of heritage, urban chic and country pursuits, all within a stone's throw of London. Experience this market town and you will discover more than you'd expect. Most of all it is a place to return to and tell others about.</i></p> <p><i>Combining one thousand years of history with independent shops, contemporary art galleries, restaurants, cafes, delightful drinking spots, great attractions and a thriving events calendar, plus outdoor activities from walking across the South Downs to canoeing or cycling... there is something for everyone.</i></p>	<ul style="list-style-type: none"> ▶ Twitter (7421); #sussexbythesea ▶ Facebook (2160) ▶ Instagram (1,011) ▶ Website – new site, nicely put together with good use of moving images and celebrity quotes. Copy is sometimes a little breathless ‘so much to see and do!’ and over-promising. Good range of themes and suggestions, some done as blogs so variety of tone of voice. ▶ Facebook (2,000) ▶ Instagram (1,000)
<p>Bognor Regis Love Bognor Regis Delivered by Vinco Marketing</p>	<p><i>Fall in Love with Bognor Regis</i></p> <p><i>You won't have to look far to find things to do in Bognor Regis and the surrounding areas, from the beautiful coastline, to the shops, restaurants and seaside attractions such as crazy golf and the award-winning Butlin's Holiday Resort. There is plenty to keep you and the whole family entertained in Bognor Regis and with the likes of Chichester, Arundel and Littlehampton right on our doorstep, there is lots to explore within a short drive away.</i></p>	<ul style="list-style-type: none"> ▶ Website – design clean and modern, copy little generic and sometimes clichéd – and currently some parts out of date. Relies a lot on paid listings so little inspiring content and some with only local relevance. ‘Inside Bognor’ section is good with blogs and features which unpack the destination written in a nice tone of voice. Markets beyond Bognor. ▶ Twitter (4,338) ▶ Instagram (6,447) ▶ Facebook (18,000)

Destination	Positioning	Channels
<p>Littlehampton</p> <p>Visit Littlehampton Managed by Town Council</p>	<p><i>Discover the many sides of this vibrant Town</i></p> <p><i>Two award-winning beaches, the beautiful River Arun and a large seafront green makes Littlehampton a popular destination for individuals, families and couples. Whether you are looking for a seaside Town with plenty to do on a day out or a base for exploring the beautiful Sussex Coast, Littlehampton is the ideal place to visit. With a variety of captivating award-winning architecture including the Stage by the Sea, East Beach Café and Britain’s Longest Bench plus an extensive programme of cultural events this certainly is a must-visit destination!</i></p>	<ul style="list-style-type: none"> ▶ Website Very functional – listings and database search for things to do, attractions etc. Promotes beyond Littlehampton but essentially just links to e.g. other towns, National Trust properties etc. ▶ Twitter (438) ▶ Facebook (328)

STRATEGIC CONTEXT

THE BIG PICTURE

Tourism generates £106bn a year in England and employs 2m people. No wonder that VisitBritain's latest 5 year strategy is to **'make tourism one of the most successful and productive sectors for the UK economy'**.

But competition is fierce. Internationally the number of new and emerging destinations continues to expand. While domestically, the range, scale and quality of UK destinations continuously improves with new investment in accommodation, attractions, experiences, culture and heritage.

Consider the offer for visitors and it becomes apparent why smaller destinations struggle to achieve the awareness that they would wish for. In the UK there are:

- ▶ 927 towns or cities of more than 10,000 people
- ▶ 15 National Parks (Britain)
- ▶ 46 Areas of Outstanding Natural Beauty (Britain)
- ▶ 7723 miles of coastline
- ▶ 1600 museums
- ▶ 196 Castles and Historic Properties (England)
- ▶ 45,000 hotels

So the Arun offer not only has to be 'great', if you want to attract visitors, it has to be better than other destinations.

COMING OUT OF COVID

With VisitBritain predicting a 49% reduction in domestic trips and spend, and with forecasts being updated regularly, it is clear that 2020 will be as bad as it gets for tourism. Everywhere has experienced lockdown, closures, and quarantine. And most commentators expect that it will take a number of years to recover to pre-Covid levels.

At the same time, tourism is surprisingly resilient and the OECD states 'domestic tourism is expected to recover more quickly and offers the chance for driving recovery'³.

Recent research suggests 43% of UK adults expect to take the same or more UK short breaks this year⁴. So there are reasons to maintain some optimism.

Arun needs to think about the barriers and motivations visitors have and be clear where it has something to offer. So with visitors confidence in international travel low, Arun should be targeting near markets still wanting to take a break. A desire to avoid crowds, plays well to the strengths of countryside and quieter beaches. Places to walk and cycle are increasingly appealing to domestic visitors. And cleanliness and hygiene factors are paramount so efforts to work with business to deliver the highest standards will have dividends.

For some destinations, Covid-19 has also been a good opportunity to pause and take stock and press re-set on what they do and how they do it. This review therefore is timely and allows Arun to emerge from Covid with a new plan and routemap which positions it well for the future.

³ Tourism Policy Responses to Covid-19. OECD. June 2020

⁴ Covid-19 Consumer Sentiment Tracker. VisitBritain (Week 13)

ARUN POLICY CONTEXT

Arun’s Economic Development Strategy 2020-2025 states ‘The visitor economy continues to be a major asset but our plans are about more than tourism’, acknowledging that tourism is important while acknowledging the desire to diversify the economic base.

The analysis within the Economic Profile of Arun (background to the strategy) highlights major challenges for the district:

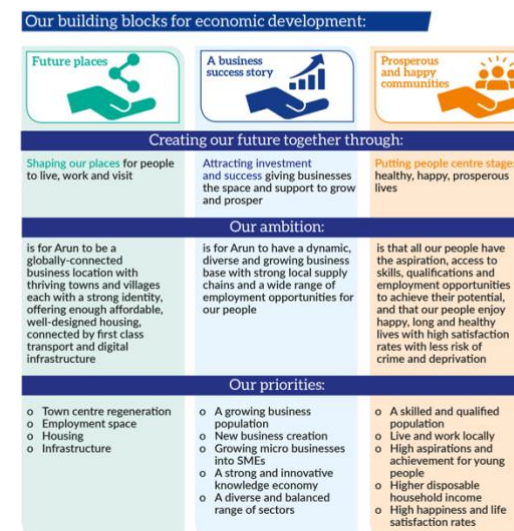
- ▶ Seasonal employment (horticulture and tourism)
- ▶ Low wage economy (in comparison to near neighbours and comparators)
- ▶ Few large businesses (0.1% have more than 250+ employees) though there are some notable companies (Rolls Royce and Body Shop)
- ▶ Lower qualified workforce – low value, low skilled labour market

This results in the district being a net exporter of labour to neighbouring areas with 8973 coming in and 27394 going out each day.

So tourism needs to support the approach set out in this strategy, renewing the offer and attracting new markets to support the economy year round with higher value jobs. The analysis in this strategy recognises the changing retail environment in town centres which must increasingly be given over to social, leisure and entertainment uses and done well this can enhance your tourism offer.

The strategy has some ambitions that reflect what tourism needs to succeed: masterplans for Bognor and Littlehampton; optimising the seafronts, seafront greens and waterfront sites; the need for the towns to be vibrant; a range of events to increase footfall; and improvements to cycling and walking infrastructure.

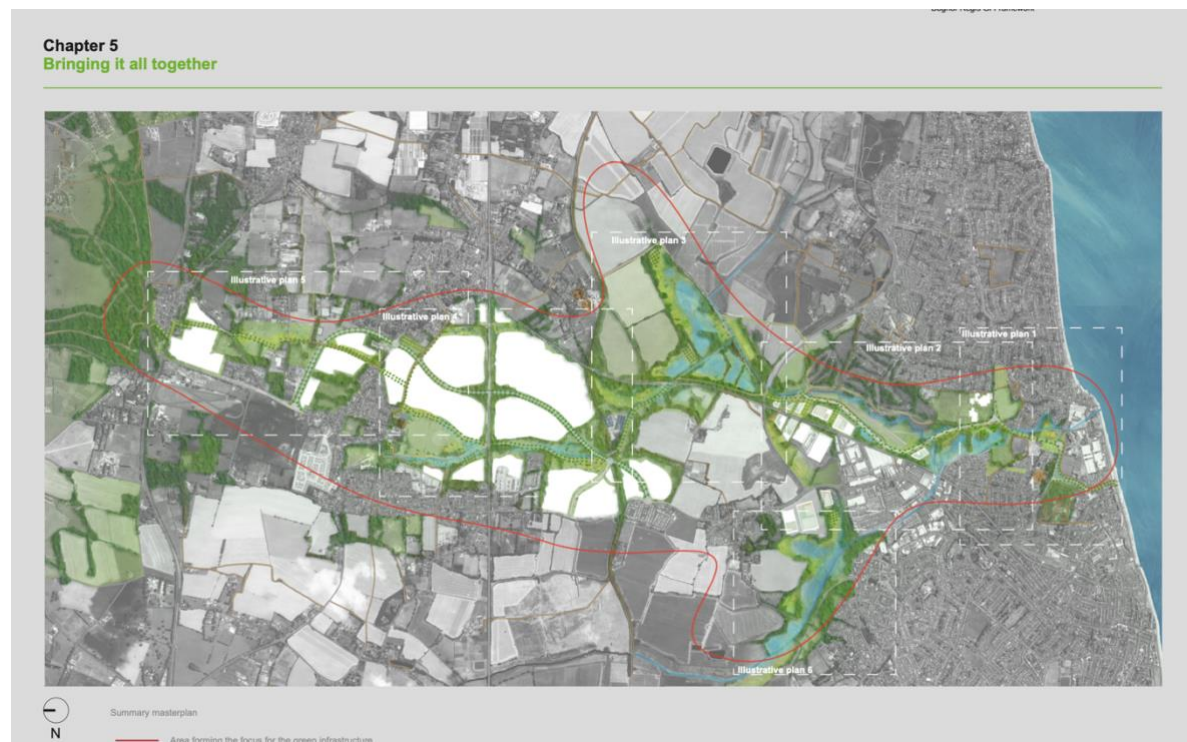
“Our vision is to create a dynamic, competitive and sustainable place to live, work and do business”



The strategy makes reference to a proposed Green Infrastructure Plan for Bognor to the South Downs. The background study was completed in January 2020 and while largely concerned with landscape design, conservation and the health and wellbeing of local communities, the proposals will have relevance for leisure activities for visitors especially in relation to cycling/walking.

From a planning perspective, the adopted Local Plan is clear in wanting to ‘create vibrant, attractive, safe and accessible towns and villages that build upon their unique characters to provide a wide range of uses and which are a focus for quality shopping, entertainment, leisure, tourism and culture activities’.

In the plan, the council supports ‘continuous adaptation and improvement in the visitor experience’ with reference to higher quality experiences, a more diverse offer and increased competition. The main outcome sought is longer stays and more retained spend.



MARKET TRENDS

In the table below are key trends particularly relevant to this piece of work. [Sources: VisitEngland, VisitBritain, VisitScotland, National Tourism Coastal Academy, Blue Sail].

Trend	What this means for Arun
<p>Communication Overload Destinations of all size competing for attention in a crowded marketplace across multiple channels</p>	<ul style="list-style-type: none"> ▶ Breaking through screening out and filtering ▶ Challenge for those with little market recognition ▶ Substantial resources required to build a destination brand/presence ▶ Clarity of the proposition ▶ Ongoing significant resources required to maintain a presence across multiple channels ▶ Targeting a focused, compelling message at the right time to the best prospect segment(s) ▶ Reviews and endorsements important ▶ Detailed market knowledge and insight kept current
<p>Maximising Behaviour Holiday makers and short breakers looking to use their limited leisure and vacation time to see and do as much as possible</p>	<ul style="list-style-type: none"> ▶ Range of quality experiences on offer that are sufficiently different from home ▶ Need for reassurance that there is sufficient to occupy and entertain ▶ Inspiration and information about what there is and how to access, book etc ▶ Has to be easy to access ▶ Joined up travel options ▶ Makes sense for individual places or experiences with common ground (e.g. a shared history, character) to club together and build a shared, more desirable and versatile product
<p>Death of Risk Constraints on budgets and holiday time mean travellers want to find out as much as possible about their destination before getting there.</p>	<ul style="list-style-type: none"> ▶ Particularly relevant in coronavirus times so reassurance on safety measures crucial for foreseeable future ▶ Prevailing interest in staycations and trips close to home ▶ Comprehensive information about what’s on offer to allow visitors to plan ▶ Reassurance that there is enough and of the right type of things to do ▶ Ease of booking either before or during the trip; clarity on terms and conditions, cancellations etc
<p>Pursuit of Real</p>	<ul style="list-style-type: none"> ▶ Quality, authentic experiences – in tune with local culture and way of life ▶ Seeking out of immersive, distinctive experiences

Trend	What this means for Arun
<p>Genuine, authentic, local experiences sought in preference to mass tourism 'sight-seeing'.</p>	<ul style="list-style-type: none"> ▶ Families creating memories together – meeting the needs of multiple generations ▶ Bragging rights, shareable experiences ▶ Experiences that combine fun /learning/self-improvement/well-being ▶ Local – food, drink, crafts, independent businesses rather than chains ▶ Individual elements can be small but must add up to a holistic, integrated trip experience
<p>Multiple Interests Meeting multiple needs within the travelling group (families, friends, multi-generations).</p>	<ul style="list-style-type: none"> ▶ Extensive range of types of accommodation and experiences available, and easy to access ▶ Activity and special interest holidays/breaks with weekend and day options ▶ 'Pick and mix' from a variety of options to create personalised trips e.g. active experiences with general holiday pursuits such as visiting historic sights, shopping and entertainment ▶ Base in one place and take trips out from coast to inland or from towns to coast
<p>Living with coronavirus Addressing a reshaped tourism landscape with restricted supply and weakened demand.</p>	<ul style="list-style-type: none"> ▶ Importance of safety and hygiene measures in all elements of the visitor experience ▶ Demand likely to be greater for rural areas, destinations with open/car-free public space, for outdoor activities and attractions, and for self-catered accommodation ▶ Faster recovery in demand from families and those visiting friends and relatives ▶ Marketing messages need to respond to evolving market concerns over next few years – not enough to say 'come now'

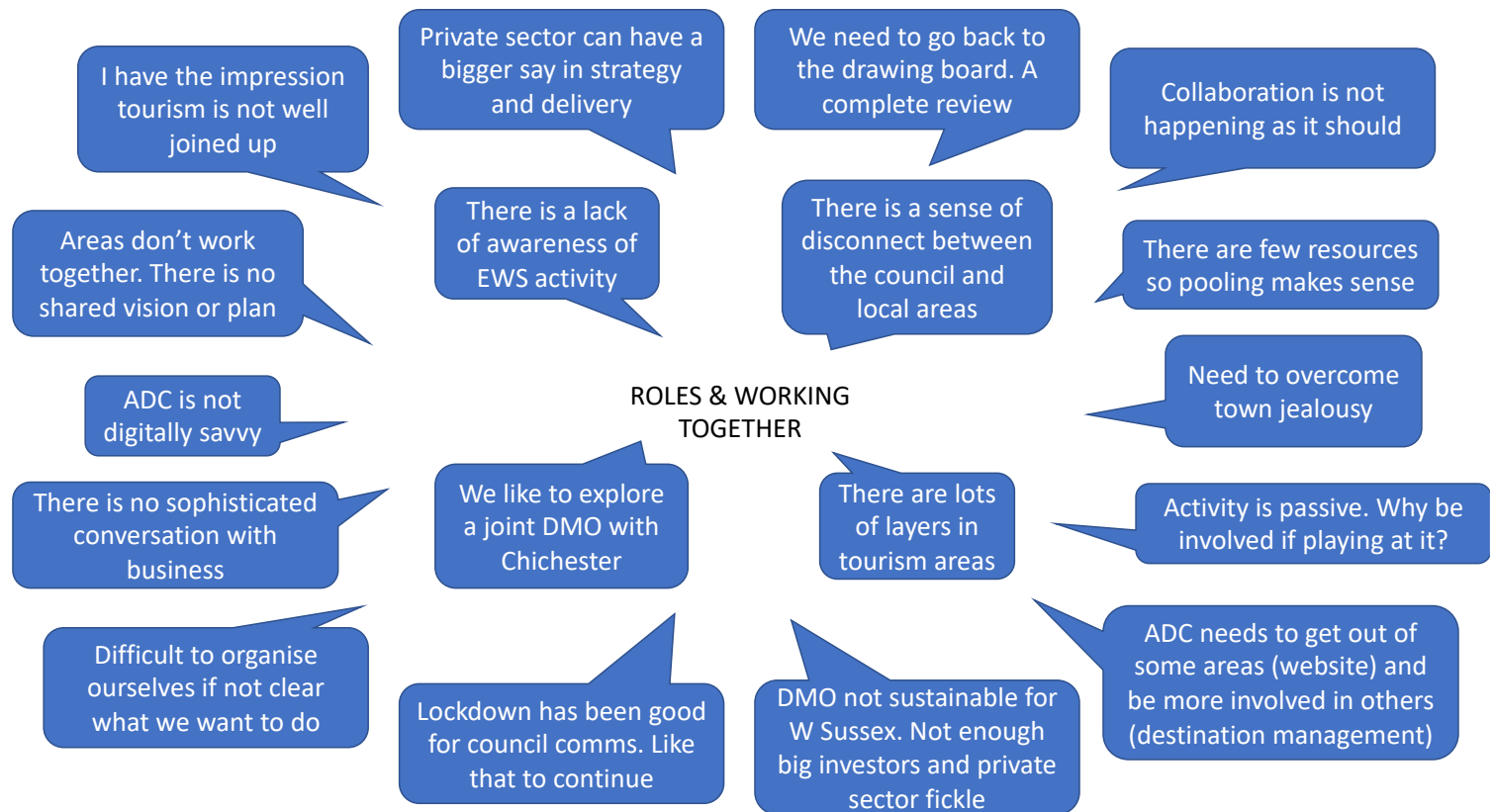
WHAT WE HEARD

ORGANISATION, ROLES & COMMUNICATIONS

Through the stakeholder consultation, we found a clear recognition that the council has limited resources and that there is a need to work smarter, whether that is in the pooling of resources, or in focusing activity.

Communications between the stakeholders could be better, for example lack of familiarity with the work of Experience West Sussex or the existence of research and insights.

Most pointed out the need for a clear strategy to determine focus and roles.



MARKETING

The identity and perception challenge for Arun was evident with most highlighting the lack of awareness of Arun and only slightly greater awareness of Littlehampton, Bognor Regis and Arundel.

Likewise, many felt 'Sussex' had some resonance, but 'West Sussex' was just as difficult to understand with the towns being better known as well as the South Downs National Park.

The promotional activity of Arun District Council (website, social media and brochure) were perceived to be not particularly effective and many questioned whether the council had the skills to address areas of opportunity.

Many saw the need to promote the very best and use those to hook visitors in rather than presenting everything the area has to offer.



VISITORS & INSIGHTS

A number of consultees felt there was a need for more data and intelligence to support decisions. But most of these were unaware of the research already produced by the district and Coastal West Sussex.

Most agreed on the current markets and felt the markets they wanted were younger groups and couples.



EXPERIENCES & DEVELOPMENT

This was the subject which received the most comments. With most feeling there was a need to lift the quality of what was there now and develop new experiences to attract new, discerning visitors.

Most cited a need for more and better accommodation and the potential for cycling and watersports was frequently raised.

Again, it was felt there was a need for a clear plan to judge the merits of potential development.



STRATEGY

There was a clearly identified need expressed for a plan or strategy to plot development and organisation against and to clarify the markets and their needs.

The objectives were fairly clear: to increase the spend and duration of stay from visitors, the economic impact and jobs.

It was also suggested that there was enough for everyone to be doing and no need for there to be duplication but that there should be greater clarity about individual roles and better alignment.



WHAT NEEDS TO BE DONE

SWOT

Below is our analysis of the situation – of the strengths, weaknesses, opportunities and threats facing Arun District and which guide our response in the recommendations that follow.

Stakeholders and the Council are up for change and that is very positive. However, a new approach to supporting tourism needs to ensure that:

- ▶ It is market focussed – the decisions you take should be driven by what visitors want not by what you want to sell them or say to them. They have a big choice and you need to keep one eye on your competition.
- ▶ Neighbours are not competitors – visitors don't see the boundaries. They see experiences that complement what you have to offer.
- ▶ Collaboration is key – business, the towns and the council must all work together. A shared narrative will make the destination more appealing.
- ▶ It is focussed – doing less better with clear roles for the County, District, the towns and business. Keep limited resources targeted to maximise impact. The council only acting where it adds value and supporting others better placed to run activity.
- ▶ New experiences are developed – play to your destination strengths and continue to develop products and experiences that strengthen your appeal.

Strengths

- ▶ Proximity to source markets for visitors
- ▶ Reasonable starting point (4.04m visitors and 4360 FTE jobs)
- ▶ Variety of offer (beach, towns, heritage, countryside, national park)
- ▶ Robust local markets
- ▶ Butlins – national brand, reputation, investment and jobs
- ▶ Pleasant seaside and countryside
- ▶ EWS doing good 'inspiration' work. Towns doing good 'information' work.

Weaknesses

- ▶ Sussex by the sea website and digital capabilities (and number of users)
- ▶ Traditional marketing and information delivery by ADC (brochure/VIPs)
- ▶ Day visits dominate
- ▶ Not enough accommodation
- ▶ Strategy out of date
- ▶ No shared ambition for coalescing around
- ▶ Identity (Arun unknown, Sussex by the sea unclear) and little market recognition
- ▶ Retail in towns changing
- ▶ Use of the word 'nice' was used a lot to describe the area. Not compelling enough
- ▶ Seasonal tourism economy
- ▶ Many SMEs and lifestyle businesses
- ▶ Not enough to see and do (especially activities on land and water)
- ▶ Events seen as 'pedestrian' – not impactful
- ▶ Basics need to be better (e.g. toilets)

Opportunities

- ▶ PR activity and use of influencers
- ▶ Everyone up for change
- ▶ Pooling of resources needed to have any impact at all
- ▶ Green infrastructure – cycling and walking routes (R. Arun, Bognor-S Downs, Wey navigation)
- ▶ Masterplans and continued development of Littlehampton and Bognor
- ▶ Preservation and adaptation to lift quality of Arundel
- ▶ Watersports potential & cycling
- ▶ Experiences for younger audiences (seafront eating/drinking)
- ▶ Create experiences that have bragging rights are high quality and distinctively local
- ▶ Make more of assets in neighbouring areas with Arun as the 'base'
- ▶ A clear destination management role
- ▶ If identity is hard don't try to come up with a 'one-line' description – reflect the variety in a shared story (be anti-brand)
- ▶ Share what you have better (research, intelligence)

- ▶ Involve others in the thinking/planning and get 'buy-in'.

Threats

- ▶ Good work of EWS not recognised/understood and therefore ongoing support threatened
- ▶ Lack of visitor focus (many focussed on local needs/interests)
- ▶ Lack of excitement/ambition leads to lack of investment (public and private)
- ▶ Being insufficiently focussed/targeted – trying to do too much
- ▶ Covid-19 leading to long-term major changes in visitor behaviour and business viability

MARKETING ANALYSIS

If you take the visitor journey as a guide for where potential visitors are open to influence, the current arrangements with the county led Experience West Sussex activity have the ‘Imagining’ and ‘Planning’ elements quite well covered. With the town-led websites and social media platforms helping visitors at the ‘Experiencing’ stage. ‘Booking’ is largely driven by online travel agents and commercial booking websites.

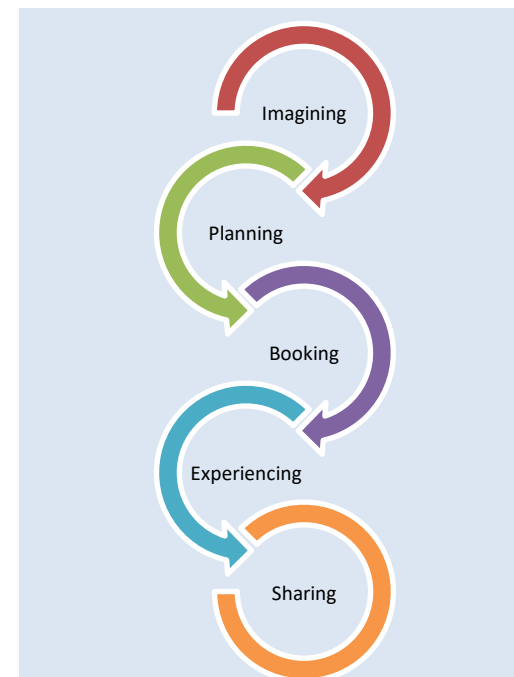
When it comes to destination marketing Arun District Council falls between two stools. Above sits West Sussex, a destination with greater market awareness, critical mass of ‘product’ and marketing leverage to raise awareness and inspire visits. Beneath it sits individual destinations with their own particular offer and which can provide the detail in their marketing to convert interest to booking. It is hard to make a case for the District Council undertaking destination marketing for Arun.

There are significant challenges in awareness and interest in terms of the geography as well as understanding of the tourism offer. This applies to all locations within West Sussex and even ‘West Sussex’ itself⁵. On the other hand there is a greater awareness among visitors and non-visitors of Bognor Regis and Littlehampton, and to a lesser extent Arundel, than there is of ‘Arun’. There is no clear, strong proposition for the district as a whole and current marketing understandably focuses on these three towns.

Arun District does have good tourism assets however:

- ▶ Coastal/seaside resort – beaches and seaside fun, entertainment, Butlin’s brand
- ▶ Landscape, history, market towns – for browsing, relaxing, exploring and some gentle activity in lovely surroundings.

Figure 1 Visitor Journey



⁵ Tourism Research Project for Coastal West Sussex, TSE 2016

- ▶ Proximity to large populations – ready markets within easy travel distance
- ▶ Proximity to National Park – association with a strong brand and understandable experience

Arun has three distinct propositions with some, but not much, overlap:

- ▶ Seaside with a twist – Littlehampton providing a traditional resort in the process of reinventing itself
- ▶ Traditional seaside – Bognor Regis and Butlin’s providing traditional good fun, self-contained holidays
- ▶ Market Town Heritage – Arundel providing the relaxing pleasures of an historic small town, nearby villages and attractive landscapes

These are likely to have most resonance with a day trip market and a domestic staying market within a two- hour (or up to three for the longer stay options in the resorts) travel time. From VisitEngland’s segmentation system⁶ two segments have a particularly good fit; these both reflect the current market and have most growth potential. The segments are called ‘Fun in the Sun’ and ‘Country Loving Traditionalists’.

SEGMENT	ATTRIBUTES	DESTINATION APPEAL
Fun in the Sun	Typically parents looking for family orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more ‘social’ alternatives to hotel accommodation, such as caravans or holiday camps. This segment skews higher in the 30-50 age group – as expected for families. (The 30-50 group represents 55% of this profile vs. 40% average.) More likely to live in West and South West.	Resorts – self-contained good-value family fun, fun fairs, fish and chips etc Beaches – play, picnics, walks Activities – watersports, cycling, soft adventure
Country-Loving Traditionalists	Typically empty nesters with traditional values, country-loving traditionalists have a moderate household income, but fewer family members to cater for when on holiday. This means that their budget stretches further, and good quality, secure	Good fit for West Sussex generally. Arundel – local shopping/markets, churches, antiques, etc

⁶ <https://www.visitbritain.org/visitor-segmentation>

SEGMENT	ATTRIBUTES	DESTINATION APPEAL
	<p>accommodation is a priority when booking a holiday. They are likely to have recently taken a countryside break and keep up to date with UK tourism through websites such as English Heritage and the National Trust. This segment skews older, particularly over the age of 50. (Over 50s represent 56% of their profile vs. 41% for the average.) More likely to live in East/Anglia and South East.</p>	<p>Food & drink – independent, artisanal, quality History & heritage – Castle, Cathedral Seafront - Littlehampton Exploring the South Downs – Inc. cycling and walking</p>

WAYS FORWARD

We have identified four over-arching recommendations for Arun District Council which have implications for the way in which you organise and support tourism development in order to meet your wider strategic ambitions.

RECOMMENDATION 1 - STRATEGIC TOURISM INVESTMENT ROLE

There is a need to ensure that Arun not only has the best quality of experience to offer visitors but that it continues to add to the experience in ways which will attract visitors and help maximise local benefits. This is a strategic role and one which aligns closely with other economic regeneration functions.

This is a new role but one which is critical if Arun is to grow its visitor economy and compete effectively. The activity is about supporting private sector investment, maximising the benefits from public investment and it making certain that there is someone advocating for visitors in the ongoing delivery of public services within the authority.

RECOMMENDATION	ACTIONS
<p>Provide a strategic destination investment role in the council. This post should lead on the strategic development of the destination, stakeholder relationships and the commissioning of marketing services via other providers.</p>	<ul style="list-style-type: none"> ▶ Recruit a strategic tourism lead responsible for destination investment, management/development ▶ Use the Tourism Strategy to define development priorities (e.g. visitor accommodation, watersports, walking/cycling, welcome, events, signage) ▶ Pick a development project/year – work with neighbouring authorities on shared plans and investment across boundaries ▶ Support town development plans (similar to Fáilte Ireland guidelines)

RATIONALE	OUTCOMES
<ul style="list-style-type: none">▶ Need to improve the offer to remain competitive and capitalise on destination opportunities to attract discerning/new visitors e.g. watersports, and investment▶ Clear interest and appeal identified in consultation with a number of challenges to be addressed, and opportunities to take forward	<ul style="list-style-type: none">▶ More spend (e.g. increased overnights)▶ More profitable businesses and more jobs▶ More year round tourism (through increased activities, experiences and indoor offer)▶ Improved quality of existing offer

BEST PRACTICE EXAMPLE – THANET DISTRICT

In 2019 Thanet decided they needed to update their district destination management plan which had last been done in 2014. A new 5 year plan (2020-2025) was produced to strengthen and grow the visitor economy.

The plan was not about everything that could or should happen but about the things that would make the biggest difference, could be realistically delivered and which provided a focus for working together.

The plan is about growing the value of tourism, becoming more competitive and lifting the quality of the visitor experiences through private as well as public investment.

The plan provided 3 new priorities for the region:

- Vibrant Towns – making Thanet’s town centres more attractive for visitors and providing more of the right kind of accommodation
- Coastline Focus – focusing on providing year-round experiences, activities and facilities at key sites along the coast
- The Isle of Thanet Promise – using the strong themes from Thanet’s Shared Story to develop brilliant experiences and a brilliant welcome.

It was developed through an engaging process with tourism businesses that resulted in buy-in and support for the delivery of the new plan and uses the strategic tourism resources at the council to take forward.

Destination Management Framework

The Destination Management Framework (DMF) 2020 is for all partners in the destination and sets out shared key priorities for strengthening and growing the visitor economy for the next 5 years. It focuses on key things that will make the biggest difference and which can be realistically achieved by working together.

The Framework draws on views of stakeholders in Thanet’s visitor economy, including attractions, accommodation providers and event organisers. These views were gathered through meetings, interviews, an interactive workshop attended by more than 50 people and via an online industry survey. Also used was recent third-party/existing research, including localised volume and value data, the results of face to face visitor surveys and perception research, as well as national research on holiday trends and coast perceptions. The framework builds on the work achieved through the first [Destination Management Plan](#) developed in 2012/13.

The headline priorities are:

- **Vibrant Towns** - making Thanet’s town centres more attractive to visitors and providing more of the right kind of accommodation.
- **Coastline Focus** - focusing on providing year-round experiences, activities and facilities at key sites along the coast
- **The Isle of Thanet Promise** - using strong themes from Thanet’s shared story to develop brilliant experiences and a brilliant welcome.

The Framework was commissioned by Thanet District Council (TDC) and developed by Blue Sail. TDC’s senior executive team has input to its development.

The Framework was prepared before the COVID-19 crisis, but the content is still relevant and will help inform the recovery of the sector.

[Read the full Destination Management Framework](#)

The Shared Story



[See more](#)

Destination Management



[See more](#)

Shared Story Toolkit



[See more](#)

Business Support



[See more](#)

RECOMMENDATION 2 - START WITH A PLAN

Your tourism strategy is out of date and it is difficult for you and others to know whether decisions about activity, development, events, organisations or marketing are the right ones.

This project and plan is about ‘delivery’ of tourism services in Arun District Council but in preparing it, we have given thought to your current situation, the context, market and development opportunities. It would not take much effort to go from where you are now to having a new Tourism Strategy to guide your activity over the coming 5 years.

A Tourism Strategy is however just a document. As important is the way you go about generating support for how it is implemented and supported so the process of creating the new strategy should include the wider tourism industry in Arun. Use the process to galvanise ideas and opportunities into concrete plans and to get everyone working together and ensure that the new Strategy is focussed on as few priorities as possible. Long lists of actions are unlikely to be delivered. In our view the process should be led by the new Strategic Tourism Officer. If funding allows, running this process consecutively with the ‘shared narrative’ (Recommendation 3) would be more efficient and beneficial.

RECOMMENDATION	ACTIONS
Develop a new tourism strategy in 2020/21 with your businesses and key stakeholders.	<ul style="list-style-type: none"> ▶ Develop brief and commission the strategy development ▶ Form a business group to support implementation and monitoring of progress and aid communications
RATIONALE	OUTCOMES
<ul style="list-style-type: none"> ▶ Renewed focus for destination development and marketing ▶ Ambitious but realistic targets to support economic objectives and employment ▶ Positive outcome from Covid-19 ▶ Shared buy-in to deliver across public/private/third sector 	<ul style="list-style-type: none"> ▶ Improving visitor economy outcomes (spend and jobs) ▶ New development in the District (accommodation, experiences) ▶ Better year-round tourism ▶ Aligned bidding and investment in community assets e.g. cycling/walking/public realm

BEST PRACTICE EXAMPLE – PLYMOUTH

In 2018 Destination Plymouth updated their visitor plan to build on the significant strides they had made since their previous plan (2011) had been produced and which had resulted in a 25% growth in visitor numbers. They had achieved a lot (Mayflower 400, The Box Cultural Venue, Ocean City Identity etc) and needed a new ambitious plan to propel them forwards.

The plan which was developed set out a clear vision: *‘Plymouth is Britain’s Ocean City, famous for its Waterfront. We will be one of Europe’s finest waterfront cities, celebrated for our unique and diverse marine life, culture and experiences. We will continue to be recognised as unique among UK cities for our natural drama and 500-year history as a place of embarkation and exploration.’*

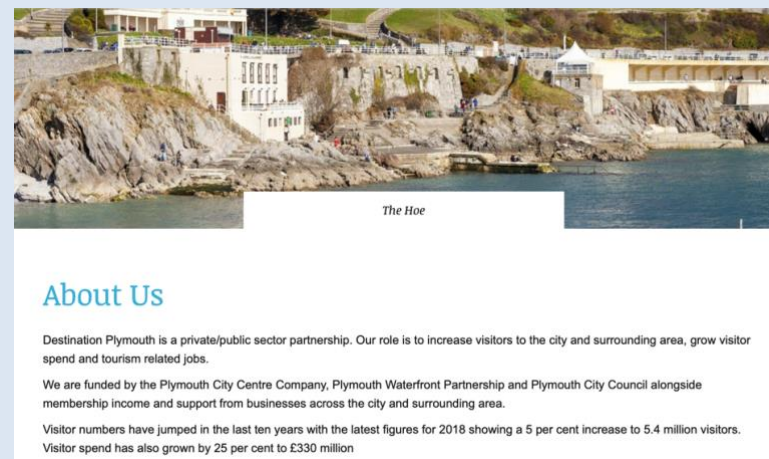
It also had ambitious targets to grow spend (30%) at a much higher rate than visitors (15%) and the plan was focussed on just 3 themes:

- Blue-Green City – with a ‘national marine park’ globally recognised for amazing experiences by, on, in and under the ocean...’
- Brilliant Culture – ‘known internationally for jaw dropping art, authentic cultural experiences and our urban spirit’
- Premier Destination – ‘Devon and Cornwall’s premier visitor destination and a top-ten UK city break’

The plan included some important enablers such as Partnership, People, Infrastructure, Accommodation, Brand, Markets and Business Tourism.

Importantly it provided the framework for partnership and private sector investment, for bidding and securing grants for development, and to underpin market focus and marketing development.

The plan is for the city rather than the City Council and is driven by the private sector led board of the DMO, Destination Plymouth.



RECOMMENDATION 3 - DEVELOP SHARED NARRATIVES

The destination of Arun is not well understood by visitors and the individual towns have different offers that make it difficult to bring them together under a single identity. But most visitors don't respond to a one-line identity or logo in any case. Visitors take their knowledge and inspiration from many sources (news, tv, articles, social media, film, websites, search engines etc). This means that most official destination marketing organisations are just one small channel in delivering destination marketing messages to potential visitors. Local businesses, local media, residents, journalists, blogger and vloggers are part of the rich tapestry of writers and channels that can help you reach the visitors you want to attract. So it is not 'what you say', but 'what others say about you' that matters most.

How can you influence others to say the right things? Developing an agreed and shared narrative is one way to strengthen the collective communication capabilities of your industry. And the development of a suite of tools (stories, words, images, video etc) can be used by that industry as well as journalists, influencers, bloggers and vloggers to talk consistently about the things you want to say about the destination. Whether thematic or geographic, stories of 'heritage', 'farm to fork', 'being active outdoors', 'unusual places to stay', 'family experiences' are the sorts of things which can be developed as tools to help whoever is communicating do so with passion, inspiration and consistently.

Like the Tourism Strategy this is a focussed piece of work that could be delivered alongside your strategy which would make it more effective and an efficient process.

RECOMMENDATION	ACTIONS
Develop shared narratives and toolkit in 2020/21 for tourism stakeholders	<ul style="list-style-type: none"> ▶ Develop brief and commission a suite of narratives by town and theme ▶ Ensure the recent Bognor Regis Place Branding narrative and 'filters' are applied for the town and align with the Arun narrative. ▶ Consider commissioning alongside the tourism strategy
RATIONALE	OUTCOMES
<ul style="list-style-type: none"> ▶ Arun not a strong identity for visitors ▶ Different and varied towns with no agreement on single identity ▶ Strong themes and concepts in Arun ▶ Present the variety rather than try to distil down to a single idea 	<ul style="list-style-type: none"> ▶ Clear and agreed messages used by all business ▶ Increased impact with visitors (consistency) and increased visits and spend

BEST PRACTICE EXAMPLE - ABERDEENSHIRE

Aberdeenshire in the North East of Scotland had three DMOs – one for the city of Aberdeen, one for the north coast and one for Royal Deeside. There was no consistent approach to marketing or development across the area, nor was the whole area covered by a DMO. This was perceived by the City and County Councils, Scottish Enterprise (the economic development agency) and VisitScotland to be contributing to a lack of profile and underperformance of the area.

A review of strategy and structures resulted in the establishment of VisitAberdeenshire – a DMO bringing together businesses, support agencies and local authorities behind one strategic approach. The two ‘old’ rural DMOs continued to operate as local partnerships while the city DMO merged into VisitAberdeenshire.

To recognise the differences across the county while aligning how it should be promoted, VisitAberdeenshire commissioned the production of a series of Shared Stories™. These are narratives which capture the essence and strengths of the place and can be used in marketing by the DMO and individual businesses as well as informing the priorities for product development. In total three destination narratives (reflecting each of the old DMOs) and six thematic narratives (e.g. castles, food & drink, outdoor activities) were produced, as well as one overarching Shared Story™ for the whole area. The narratives were produced with involvement and input from businesses, which helped secure their buy-in to the new organisation and new approach.

The Shared Stories™ are used by VisitAberdeenshire in marketing communications (verbatim on their [website](#) for example). They have also been picked up by Aberdeen airport for use on the walls of the terminal alongside striking images of the area. A Shared Story™ [toolkit](#) was produced to encourage and help businesses use the narratives, associated ‘word bank’ of key words and phrases, and example imagery.



RECOMMENDATION 4 - MARKETING & INFORMATION

As this review has shown, with others best placed to deliver destination marketing and information, through the individual towns and Experience West Sussex, the marketing role for the District Council is limited to providing support for these platforms.

There is however, in our view, still an important role for the Council:

- ▶ Active participation in the Experience West Sussex Partnership, including advocacy for Arun’s tourism propositions and funding to help support destination marketing
- ▶ Support and funding for the 3 destination sites of Arundel, Bognor Regis and Littlehampton specifically tied to certain requirements to ensure professional, high quality and effective destination marketing. This should include:
 - Adopting and rolling out the shared narrative (previous recommendation) which can run through all marketing
 - Help with professional copy writing to give a distinct, appealing character and tone of voice to marketing communications reflecting the destination narrative. (At the moment there is a disproportionate focus on ‘so much to see and do’, ‘whether you are looking for this or that’ ‘something for everyone’ rather than creating a targeted, distinctive and appealing destination proposition).
 - Support for developing and optimising social media channels
 - Requirement to cross sell to other Arun destinations with appropriate guidance on how this should be done
- ▶ Support for destination PR activity delivered directly or through Experience West Sussex including costs of hosting press visits, production of media packs etc.

RECOMMENDATION	ACTIONS
Commission destination marketing and information services through other providers. Stop all destination marketing delivery at the District including Sussex by the Sea website.	<ul style="list-style-type: none"> ▶ Funding agreement for Experience West Sussex and aim to get similar support from other authorities ▶ Mothball ‘Sussex by the Sea’ website and promotion as visitor journey covered by other platforms and also stop related social media platforms.

	<ul style="list-style-type: none"> ▶ Cease production of the visitor guide – direct information enquiries and business links via the town sites and social media ▶ Cease the provision / support of Visitor Information Points in Arun ▶ Support press trips and media enquiries using strategic tourism officer
RATIONALE	OUTCOMES
<ul style="list-style-type: none"> ▶ Visitor journey stages covered by other platforms ▶ Limited impact currently ▶ Better outcomes through support for other platforms 	<ul style="list-style-type: none"> ▶ Increased scope and impact of EWS activity ▶ Stronger town platforms driving support to local business ▶ Increase numbers of visitor and spend

RESOURCING THE PLAN

It is possible to support these recommendations within existing resources. Our suggestion for how the funding could be prioritised is as follows:

RECOMMENDATION	YEAR 1	YEAR 2	YEAR 3 (& ongoing..)
Strategic Tourism Investment & Management (development)			
- Strategic Tourism Officer	£35000	£35000	£35000
- Annual Development Project	£0	£0	£5000
Tourism Strategy	£10000	£0	£0
Shared Narrative	£0	£10000	£0
Marketing			
- Town Tourism Support		£5000	£10000
- EWS Support	£20000	£20000	£20000
	£70000	£70000	£70000

There are also other potential funding streams that the council should closely monitor and could be accessed to support tourism activities such as:

- ▶ Grants and funds (Coastal Community, Future High Street, Discover England Fund)
- ▶ Generating more direct income from visitors making use of council assets and commercial premises (through property lease, seafront licenses, event fees, off-street parking etc)
- ▶ Business Investment in supporting public services (e.g. toilets)
- ▶ Shared commercial development (e.g. ADC develop a hotel with an operator similar to [Stockton-on-Tees](#) and [Lincoln](#))

Any one-off allocations could mean that some of these actions are brought forward or additional resources could be allocated to ramp up activity and impact in other areas.

Other projects that could be supported by discrete investments, grants and discretionary spending could include some of the following (the detail of which would be developed through the Strategy process):

POTENTIAL PROJECTS (ADDITIONAL/ONE-OFF RESOURCE)	ESTIMATED COSTS
Seed investment in major tourism events (capable of generating 25k+ visitors)	£20000-40000/event
Town Tourism Challenge Fund (e.g. signage/wayfinding, visitor Wi-Fi, seafront showers etc) with match requirements	£10000/town p.a.
Accommodation Development Prospectus and marketing	£5000

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is delivered in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance