Brighton & Hove Visitor Economy Strategy

2018-2023

Economy, Environment & Culture

Supporting economic growth and maintaining an attractive, connected and well run city for residents, businesses and visitors

visitBrighton

Brighton & Hove City Council

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FOREWORD

Councillor Alan Robins
Chair of the Tourism Development & Culture Committee

This is a Visitor Economy Strategy (VES) for Brighton & Hove. It is a strategy for the city first but looks outside to identify how the city and region can work together on tourism for mutual benefit. The work has been commissioned by the City Council but this is a strategy for everyone with a responsibility or an interest in the visitor economy. Its success relies on everyone getting behind the priorities and recommendations set out here and working together to deliver them. The strategy has been informed by consultation with national tourism agencies, regional partners and local businesses. A separate Destination Management Plan, sets out priority actions for partnership working to improve visitors' experience of the City, and arrangements for a new Destination Experience Group.

The City Council is relooking at the city's future, its priorities, approach and the delivery structures needed to realise its potential. This VES has been developed at the same time as the Brighton & Hove Economic Strategy and Action Plan, and the Greater Brighton Inward Investment and Export Strategy. It is designed to work with these documents, to align with the Cultural Framework for Brighton and inform the 20-year Vision for Brighton & Hove. It draws on the findings and recommendations of the hotel study undertaken for the city. It looks at how it can support wider city objectives to ensure tourism continues to deliver for Brighton & Hove and its businesses.

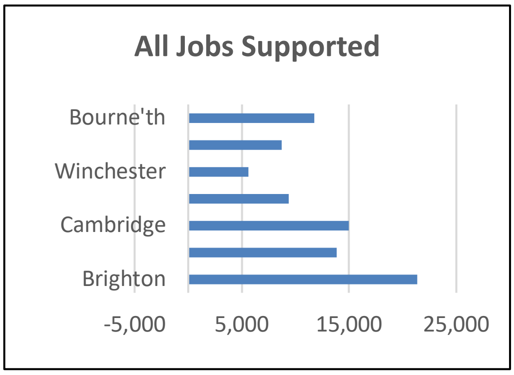
Anne Ackord
Chief Executive Officer of the Brighton Pier Group and Chair of the Tourism Alliance

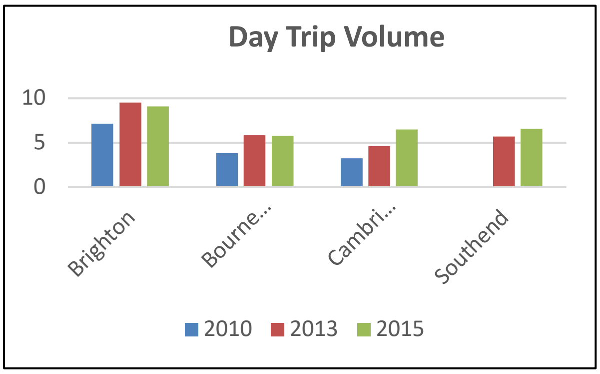
Brighton & Hove is a tourist city, the visitor economy keeps the destination thriving year-round and helps to make it such a special place to live, work and study in. As the CEO of the Brighton Pier Group, I know how important tourism is to my business but the city as a whole needs to work collaboratively in order to ensure that the visitor economy continues to grow. I became chair of the Tourism Alliance in order to encourage joined-up thinking across the industry and I am pleased to see that Brighton & Hove City Council has echoed that sentiment within this strategy, looking at the wider region as well as within the city limits. Tourism businesses within Brighton are passionate about our city and we are keen to ensure that the visitor economy continues to thrive in the years to come and this Visitor Economy Strategy is an important first step.

1 SETTING THE SCENE

THE BIG PICTURE

The Visitor Economy Strategy 2018 - 2023 recognises the value of all visitors to the city and continues, alongside important work on 'target leisure markets' outlined in the strategy, to improve the visitor experience for everyone. Tourism is big business in Brighton & Hove. The city attracts over 11 million trips that deliver nearly £886 million of spend in Brighton & Hove. Tourism accounts for around 14% of all employment, equivalent to 21,000 direct jobs in the local economy[1].





Tourism is thriving and Brighton & Hove outperforms its peers[2] on volume and value and in the number of tourism jobs it supports. However, headline figures tell only part of the story.

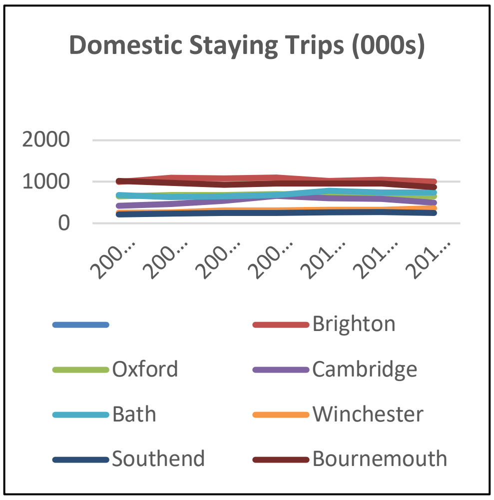
An analysis of the performance of tourism shows that **day visitors and conference tourism account for the strong performance of tourism in Brighton & Hove**. Conference tourism is high value and important to retain and nurture, but day trips have a lower per head spend than short breaks. Brighton welcomes over 9.5m day visitors each year accounting for just over 85% of all visitors to the city[3].

Brighton receives almost twice as many day visitors than Bournemouth, Cambridge or Southend.

A vibrant city centre – day and evening – plus a good rail service from London and a good road network, makes Brighton an easy day trip out of the capital.

Day visitors tend to come at weekends, in the summer months and for big festivals and events.

This concentration of day trips at certain times makes them more visible and brings higher and fluctuating management issues and costs.



[1]The Economic Impact of Tourism Brighton & Hove 2016, Tourism South East
[2] Blue Sail compared the performance of Brighton in day trips, domestic overnight trips, volume and value, international tourism and jobs with six other comparable cities and resorts chosen variously because of their accessibility from London, conference tourism, international profile, cultural and heritage offer and proximity to a national park. The cities are Bournemouth, Bath, Cambridge, Oxford, Winchester and Southend (outlier).
[3] The Economic Impact of Tourism Brighton & Hove 2016, Tourism South East

Conference tourism is important to Brighton and forms most of business tourism in the city. The city competes directly for some very significant major conferences against cities such as Belfast, Liverpool, Manchester, Glasgow and Birmingham. This discretionary business is hard won but also brings significant high value trips, predominantly at times of the year which complement other activity. Conferences account for 154,000 trips[4] to Brighton & Hove. Because the city has limited non-discretionary business travel and a limited number of corporations, Brighton's volume of business tourism trips appear lower than similar sized cities, e.g. Bristol 523,000 trips, Nottingham 291,000 trips[5].

SPEND PER TRIP FOR INTERNATIONAL VISITORS ARRIVING AT GATWICK

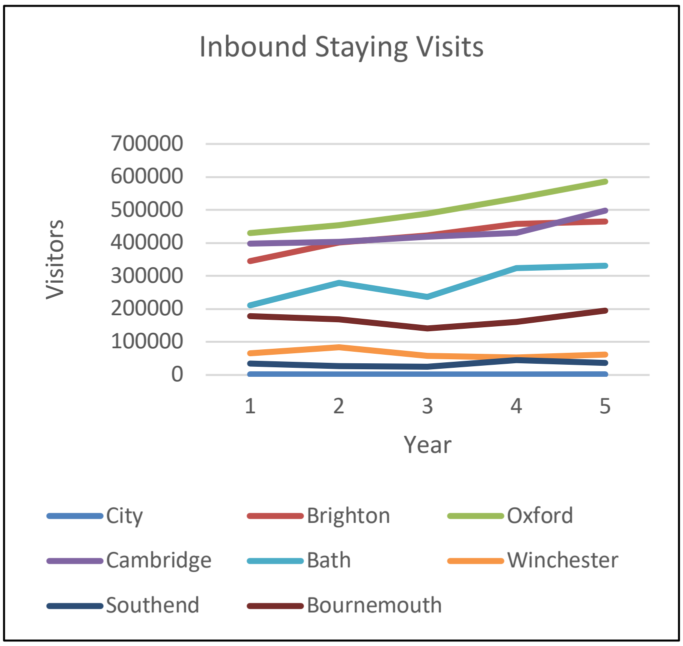
All visitors - £705
Holiday visitors - £710
Visiting Friends & relatives - £535
Business trips - £750

Gatwick Airport's Impact on the Visitor Economy, Oxford Economics, 2017

The city's hotels are busy at most times of the year, achieving an average 80% occupancy[6], but there is some capacity and a recognised need to attract more weekday leisure short breaks, outside the conference season and peak summer months. Brighton's volume of overnight trips and international visitors has not grown significantly over the last five years. Longer staying, higher spending visitors build a relationship with the place, and consequently are more likely to value and love Brighton & Hove in the way that local people do.

Brighton & Hove attracts over 465,000 overnight international visitors[7]. Proximity and easy access from Gatwick is a contributory factor to the city's performance in international tourism. 5.5 million overseas visitors arrived via Gatwick in 2017. These visitors were predominantly from Europe, travelling to the UK on holidays or to visit friends and relatives (VFR). And over half of their bednights were spent in London with a further quarter in the South East. Brighton & Hove receives 1,820 international bednights from international visitors who arrived via Gatwick[8].

Because tourism is well-established and successful, the focus in Brighton & Hove in recent years has been primarily on day-to-day management and tactical activity, all essential for the smooth running of the sector and the city. But in a highly competitive marketplace no destination can stand still. Also, when tourism is doing well, some of its wider benefits become forgotten and tourism becomes under-valued.



Much of the wider success of the city relies on tourism activity to support it. This is not only about visitor spend. Tourism is a complex sector that touches many aspects of the day-to-day life of a place and supports the facilities that create a high quality of life that make Brighton & Hove a good

[4] combined value from the IPS and Great Britain Tourism Survey 2016.
[5] Great Britain Tourism Survey 3 year moving average 14-16; and International Passenger Survey, 2016
[6] The Brighton & Hove Visitor Accommodation Study Update 2018 (awaiting adoption)
[7] Staying Visits by Inbound Visitors, International Passenger Survey (IPS), 2016
[8] Gatwick Airport's Impact on the Visitor Economy, Oxford Economics, 2017

place to live, work and study. Tourism in Brighton & Hove:

- Creates a platform and a big audience for the arts and heritage in the city, helping to sustain a vibrant arts scene enjoyed by local people.
- Delivers an extensive choice of independent shops and places to eat and drink that the resident population alone could not support.
- Ensures a vibrant weekday city centre which becomes increasingly important as more of Brighton's population commute to jobs outside of the city.
- Creates job opportunities in the city that cannot be outsourced to another location or automated – tourism is based on personal service delivered in the destination.
- Provides a platform to talk about the city at a national and international level that creates profile and positioning.

Tourism jobs are important to the city, but tourism nationally is undervalued as a career option. Many of the jobs in hotels, cafés and bars are seasonal and low paid, taken up by people who come to Brighton to work temporarily, frequently from EU countries. Fluctuations in exchange rates and Brexit means the number of EU workers is already declining and the industry in Brighton is concerned about recruitment. The scale of the challenge ahead is bigger in Brighton than for many other destinations because of the high volume of hotels, bars and restaurants.

Brighton is a compact city, with little room for further physical development and, like most of Britain, with a need for more housing. The city wants to attract more offices to create local employment, though high land values are a barrier. Yet a competitive visitor destination needs to deliver what their target markets want, and some new tourism development will be needed to remain competitive and retain market share. That requires a strong rationale for investment in the face of competing land uses, and creative thinking about how Brighton & Hove can fill any gaps in its offer.

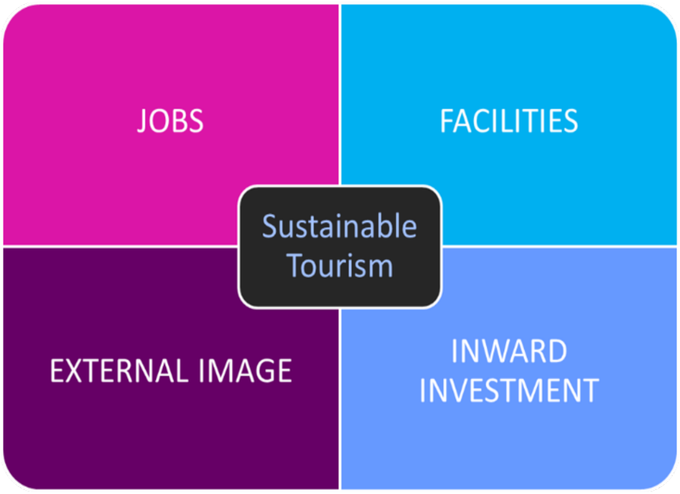
Destinations across England are increasingly working together to find creative and cost-effective ways to access new markets, in particular international leisure visitors and international conference trips. By taking a big picture view of tourism they are sharing ideas, experience and tourism resources, working regionally to achieve more in individual destinations. Brighton's proximity to Gatwick Airport and to London present currently unchanneled potential. VisitEngland as part of a potential sector deal with government are looking to create tourism zones as a way of focusing sustained investment. It is imperative that Brighton & Hove ensures it is at the table in the discussions about collaborative working.

This strategy is about new ways of thinking about tourism to channel these opportunities and potential, and how that will change the way stakeholders develop, market and manage tourism.

2 WHAT WE WANT TO ACHIEVE

As a successful and thriving destination, the goal for tourism in Brighton & Hove is **to safeguard the long-term sustainability of tourism.**

That does not mean standing still and maintaining the status quo. It means selective, clearly defined and carefully managed growth which will influence how Brighton talks about the place to the outside world - to potential visitors, buyers and investors – and how city partners value tourism and integrate tourism into the wider planning of the city. It means going about the day-to-day business of tourism in different ways. It also means safeguarding jobs and nurturing the facilities that attract visitors and looking at creative ways to fill the gaps.



Achieving the goal delivers four benefits for tourism in Brighton & Hove.

- **The value of tourism grows –** delivered through higher-spend year-round overnight visitors, from markets that will visit on weekdays as well as at weekends. The number of visitors and trips will not change significantly but the type of people, when they visit and how long they stay will.
- **There's a deeper cultural fit between the city and local people** – tourism is embedded more strongly in the city's futures planning and the type of tourism developed chimes with local culture and lifestyles, which helps to increase the appeal of tourism as a career choice.
- **Brighton is the city in the region** – that strengthens the voice and role of tourism, and its benefits to the city.
- **Businesses become more resilient** – because everyone shares the same focus, there is year-round tourism, and focused investment in people and place.

HOW WE ARE GOING TO GET THERE

- Be clear about the **visitor markets** that offer best prospects to deliver more leisure short breaks and added value conferences and what needs to be done to reach them.
- Develop a **place brand** that builds on the values in the destination brand and sharing it across all sectors including the tourism industry and applying it consistently across the city.
- **Work more closely with regional partners** where it helps to boost Brighton's positioning as the city in the region and delivers new tourism activity that creates a sustainable tourism sector.
- Raise the city's **profile with national decision-makers** to realise tourism objectives and access support and funding.
- Make tourism central to the emerging Economic Strategy for the city.
- Make visitor needs integral to city planning and management to tackle visitor management effectively.
- Develop a **five-year Destination Management Plan (DMP) which creates the Action Plan** for this strategy. The plan will be worked up with input from the tourism industry and from different departments within the Council to ensure shared purpose and to align city services around the priorities set out here.

TARGETS

Growth targets are about **value** not volume. This means a focus on growing higher spend overnight leisure and business trips and extending the length of stay.

- 5% annual growth in value of conferences from a baseline of £53m.
- 3% annual growth in bednights and overnight visitor spend per annum – achieved through attracting more higher spending visitors and extending the length of trip[9].

[9] Great Britain Tourism Survey 3 year moving average 14-16; and International Passenger Survey 2016.

3 MARKETS FOR THE FUTURE

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. People who are attracted by the city's assets, in tune with the city's vibe and potentially good ambassadors for the city (i.e. trend setters and influencers who will help to reposition it). They should be able to reach the city relatively easily using direct transport links, and they should be reachable via existing and cost-effective marketing channels. **Prioritising these targets doesn't mean that other people will stop coming but it does mean that product development and marketing spend will have a sharper focus, more impact, and better return on investment, and consequently deliver a sustainable future for tourism**.

TARGET LEISURE MARKETS – TYPE, GEOGRAPHY, LIFESTAGE

TYPE	GEOGRAPHY	LIFESTAGE*
Urban dwellers who are active and frequent break takers, with an optimistic and socially liberal outlook. They are likely to be relatively time-poor, media-literate, brand-conscious, trend-sensitive and culturally-aware. They will have above-average disposable income. Urban dwellers are more likely to use public transport – an important consideration for the city both practically and ideologically. They also have a higher tolerance for the more negative aspects of urban life – e.g. litter, graffiti, traffic, crowds, begging, drunkenness, noisy nights etc.	• **UK**: Urban areas within 1 to 4 hours' travel time. (This could include cities with domestic flights into Gatwick.) NB People living within 60 minutes are much more likely to see Brighton as a day-trip destination. • **International:** Cities with direct routes into Gatwick and/or repeat visitors to GB wanting to travel beyond the honeypots.	• **55+:** A clear off-peak growth opportunity given the ageing population trend (both UK and international) and the city's current younger visitor profile. • **Pre-family, childfree and empty nesters:** Targeting pre-family, childfree and empty nester urban dwellers makes sense, as they are they are more likely to travel outside school holidays. Also, compared to other coastal destinations, the city's offer is less competitive for staying families.

* People are living longer more active lives and are less likely to transition through life stages at the same ages or in the order they once did. But age and life stage do still have a part to play in targeting future visitors for the city.

CONFERENCE MARKETS

Here are the priority markets for conferences in Brighton. They are markets that reinforce the profile of current conference business to the city and the markets where the city has competitive advantage. They align with the priority sectors from the city's emerging Economic and Inward Investment Strategy and reinforce the city's international role and profile.

Brighton & Hove will focus on attracting conferences from the identified priority sectors for the city. These sectors are Digital, Life Sciences, Advanced Engineering and Creative Sectors. All competitive sectors. The city will need to present a strong market and location case to grow market share. It will set out the city's intellectual capital by emphasising the international standing of the research, thinking and innovation in the city's universities, hospitals and corporate research & development.

The following markets are not mutually exclusive.

- **Association conferences** – a clear strength for the city that brings staying visitors outside the summer months and during weekdays – the strategy will be retention and market penetration.
- **Academic, medical, scientific, public sector conferences** – potential to grow conferences in these specialist fields identified by the city's Ambassadors Programme which resonate with the city's sector strengths – the focus is attracting more of existing types of events and encouraging Ambassadors to develop new events.
- **London-based corporates** – a huge potential market on Brighton's doorstep, positioning the city as a place for product launches, sales conferences and team-building. Brighton & Hove will need to strengthen its place brand to support direct sales activity.
- **International conferences** – there is relatively low awareness of most UK cities among international buyers outside London. Selectively using the city's proximity to London creates a unique opportunity to win business in new international markets. That means targeted activity with intermediaries, agents, professional conference organisers and buyers with direct routes into Gatwick.

4 INVESTING IN BRIGHTON'S BRAND

A NEW PLACE BRAND

The city needs a strong, shared place brand that captures its distinctive personality and tells a compelling, contemporary story to external audiences.

This is not simply about communications. A shared brand for the city should inform investment and place management, as well as marketing.

The place brand should be integral to the Vision 2030 work and shared across sectors. Ideally a strong place brand should be owned and used by everyone in the city – especially those who project the city's values externally. It should not be a straitjacket, but rather be flexible enough to "turn up the volume" on different aspects depending on the sector and the audience.

Tourism provides the city with a unique opportunity to communicate its values to external audiences – both in the UK and internationally – in ways that other sectors cannot. It makes sense that the place brand is developed by a cross-sector partnership, with tourism playing a key role.

THE CURRENT DESTINATION BRAND

In a sentence

A creative city with a blend of modern culture and exotic architecture, sea and countryside, and a distinctive free-spirited atmosphere you won't find anywhere else.

In a couple of words

'Free-thinking city'

Who we are

- **Creative** - Brighton is an inspiring and forward-thinking city in which the arts, business, culture and opportunity for learning thrive.
- **European** - Brighton is a cosmopolitan meeting place with international recognition and broad appeal.
- **Free** - Brighton exudes a lively, free-spirited personality with an easy-going atmosphere.
- **Energy** - Brighton is a compact, dynamic and young city with passionate, imaginative and welcoming people.

Extract from "Our Brand – Official brand guidelines for Brighton" published by VisitBrighton

The current destination brand (see box) contains components that are applicable to place branding. The work done to date developing and building the Brighton Brand should not be lost. They form a sound starting point from which to discuss and develop a place brand.

The city's brand must respond to market trends and be motivating to potential new growth markets across all sectors, and relevant whether Brighton & Hove is being talked about as a place to live, work, invest, study or visit. It is important to make sure that people see the city as more than just for day trips, more than just for seaside fun, more than just a summer or fine-weather destination, and more than just a party town. Its history of alternative thinking is key – and that has already been recognised in the current brand's "free-thinking city" and talk in the brand materials of "an independent spirit" and "the story of alternative thought". A refreshed positioning for tourism that responds to market trends and future markets could be:

It's a free-thinking, independent place: a place that people with alternative ideas have been escaping to for more than 200 years.

The reference to "more than 200 years" of free-thinking brings credibility and authenticity, and reinforces the city's distinctive heritage – of people, architecture and social history. It provides a hook to use the heritage of the city more creatively and extensively and to reach out beyond the city to extend the heritage offer.

There are two aspects of the current Brighton Brand which are thematic strengths and should be a focus for tourism. They will shape the priorities for leisure and business tourism – how it is developed and communicated. They work more widely for the city as a place to live and study too, and therefore have potential value for place branding.

- Culture – which includes heritage, the arts, architecture and events & festivals.
- Wellness – this is defined in the broadest sense and for Brighton & Hove means escape, fresh air, nature and good food.

The brand should be applied consistently, creatively and widely. This means VisitBrighton always taking a brand-led approach to their marketing content, and everyone having a shared understanding about what it truly means to be a *free-thinking city* and the difference that makes to what they say, show and share … and *how* they say, show and share it.

The current brand materials also talk about "an independent spirit "and the story of alternative thought" as an extension of these ideas which need to be reflected in the experiences visitors have in in the city and in how things are communicated using emphasis, language, tone and style in all media channels.

Experiences

The city needs to use its assets to create experiences that bring to life "free-thinking city" and make it mean something to visitors. The focus will be on experiences that are led by Culture and Wellness. For example, that could include developing experiences connected with Wellness in the National Park, on the seafront, connected with the Biosphere, about vegan and vegetarian places to eat. These experiences should immerse visitors in the "real" Brighton; help them build a relationship with the city and encourage them to stay longer.

Brighton & Hove already has a rich choice of experiences, but they need to be much better packaged, presented and promoted to visitors. There is also potential to develop more engaging experiences that help to roll out the brand values and provide reasons for visitors to stay longer. That requires getting small tourism and cultural businesses working together. VisitBrighton will facilitate and support new business activity and collaboration They will provide the business tools to help groups understand what they need to do to capitalise on tourism opportunities and how to take these experiences to market directly and via the travel trade.

The cultural experience is largely about small specialist venues and events and is therefore fragmented. Much of what makes Brighton & Hove a cultural city is its creative businesses which are not part of the visitor experience, though they create a colourful backdrop and a demand for creative, specialist and alternative shops, places to eat and entertainment that are part of the visitor experience. That makes it essential to take an experience-led approach to opening up the cultural offer of the city.

Brighton & Hove has a varied seafront. Much more could be made of drawing out the range of experiences through combining seafront and city centre experiences together, around Wellness and Culture, to integrate the seafront and city centre in the minds of the visitor and encourage visitors to explore more of the seafront.

Events & Festivals

Events and festivals are a very important part of the visitor offer of any destination. They provide a reason to visit now rather than at some point in the future, they enhance the experience of a place for visitors by providing entertainment and offer an insight into a destination's character and personality. They provide opportunities to promote the city's brand values, raise the profile of the city among new markets and provide a reason for new visitors to choose Brighton.

The city hosts many events and festivals throughout the year. Some events are targeting a local audience (though visitors might go to them during a visit); some are more commercial touring events that attract a regional audience because Brighton is the most convenient location to experience the event; and a few are signature events that are unique to the city and high profile, with the ability to attract visitors to the city and shape the reputation of Brighton, e.g. the Brighton Festival. Brighton & Hove also has some growth events (they maybe specialist or regional but have the potential to become a signature event).

Many of Brighton's events are well-established. A root and branch review of all events is needed to identify those with growth potential, especially events which could deliver short breaks to the city but are not currently targeting their promotion or working with local tourism partners to achieve that.

Wherever possible, existing events and festivals should be encouraged to evolve their programming and promotion to bring it closer to the brand.

Brighton & Hove has excellent signature events but there is potential to create an additional high-profile signature event with originality, preferably outside the summer months, designed to appeal to the city's target market. The festivals would be themed around either Wellness or Culture and reinforce the brand. There may be opportunities that arise from the Cultural Framework that could be brought forward to create it.

VisitBrighton will support and take to market signature events and growth events that reinforce the brand, appeal to target markets and have the capability of attracting visitors now, or the potential to do so in the future. Decisions about bought-in events should prioritise those with a wider-than-regional reach and which reinforce the brand.

5 PLANNING FOR SUSTAINABLE GROWTH

Sustainable growth means embedding new ways of thinking about tourism in the city and working in new ways and with new partners.

MAKING BRIGHTON THE CITY IN THE REGION

Brighton & Hove has an important role to play in raising the profile and performance of tourism in the region, which in turn will support the sustainable growth of tourism in the city. Brighton & Hove will take a proactive approach to establishing its role as city in the region by:

- Initiating areas for joint working with regional partners on tourism bids and programmes to achieve more funding into market intelligence, research and product development.
- Working with regional partners on cross-destination work including on growing international tourism, tourism packaging, market intelligence, e.g. big data, bespoke research on particular markets and visitor behaviour.
- Representing the city and region on tourism and working with national partners on the big tourism issues that are relevant to Brighton & Hove including on Brexit, skills and training – to ensure the city has a strong voice among decisionmakers and that the specific needs and opportunities of tourism for Brighton & Hove and the region are represented on a national stage.

Metropolitan cities such as Liverpool, Manchester and Birmingham have successfully used this approach to strengthen the role of tourism and help the sector become better understood and better integrated into the wider functions of the city. In turn this has helped drive tourism forward, make the destination more appealing as a place to invest resulting in new products and experiences.

Making Brighton & Hove the "city in the region" is also about making that mean something to visitors. There is an opportunity to create a Brighton Plus experience that brings benefits to tourism in the city and to other destinations in the region. It is about getting visitors to stay longer in the city – two or three nights rather than one – and spend some time exploring the wider region including The South Downs National Park, historic houses and gardens and vineyards, art galleries, cultural venues and festivals. There are opportunities to create some very special experiences with high quality distinctive attractions, for example Glyndebourne or Charleston Farmhouse, and to develop a strong art gallery experience along the coast.

This approach enables the city to deliver richer Culture and Wellness experiences and positions Brighton & Hove more strongly as a base to explore beyond the city. Other destinations and attractions benefit from increased visits and the opportunity to become connected with the brand for the city and its values. As national and regional organisations increasingly favour working across larger geographies, this approach will deliver stronger opportunities to attract funding for projects.

CREATING MORE PLACES TO STAY

Brighton & Hove has a large volume of hotels and a collection of Airbnb but the range and choice of hotels and apartments is limited. The city lacks many of the new innovative hotel brands that the city's target city dwelling visitors will want to stay in and some of the accommodation falls short of the brand values. The development of the city's hotel offer requires upgrading lower quality hotels as boutique or themed hotels, most likely through new ownership. But to grow leisure breaks and be a competitive conference destination requires investment in new hotels. Brighton & Hove should also be front of mind for companies developing new brands and looking to expand out of London to reinforce its city region role. The recent Visitor Accommodation Update study for the city identified significant potential for hotel development but the lack of sites is going to continue to be a major constraint on hotel growth.

The preparation of the emerging City Plan Part Two may offer the opportunity to look at how to deliver new hotels in the city. Growth might be achieved through the Council supporting extensions and upgrades to existing hotels or through windfall hotel sites coming forward in the city centre or through identifying areas for new hotels. The Visitor Accommodation Update Study may recommend other mechanisms to support hotel development, for example producing a Hotel Investment Strategy that focuses on attracting new hotel brands to Brighton & Hove.

MANAGING THE CITY

Most visitors are concentrated in a very small footprint in the city centre. Many of the great places to eat are tucked away, it is hard to navigate the city and understand its different quarters, and visitors are often unaware of the different experience in other neighbourhoods such as Kemp Town or Hove, or the specialist trails that introduce visitors to new parts of the city and provide a reason to stay longer. Developing new experiences should be designed to give visitors a reason to explore further and understand the city better.

Signing and interpretation needs a refresh to help visitors navigate the city, designed to positively encourage visitors to explore different areas and take routes that encourage wider exploration. Much of signing and interpretation can be digital, enabling it to be customised and adapted overtime to work with the city and its businesses.

First impressions and the visitor journey from arrival to departure are essential to get right for leisure and business visitors. They can be hard to achieve in a city with as many visitors as Brighton & Hove. Valuing tourism and understanding the importance of managing the destination well is integral to a sustainable destination. Lower levels of visitor satisfaction in the city compared with other destinations[10] and concerns of the industry and tourism stakeholders are largely about the day-to-day management of Brighton city centre: arrival points, traffic management and litter collection.

There is a proven connection between public realm design, how people use and treat public spaces and their day-to-day management. Gehl Architects and Landscape Projects produced ‘Public Space Public Life' study for Brighton & Hove City Council in 2014. Some, though not all the recommendations in that study have been implemented. The tourism, planning and economic development departments in the City Council should review that work in the context of any recent changes in the city and explore how more of its recommendations can be implemented that require a review.

Brighton & Hove also needs to identify best practice on what works in similar destinations elsewhere in UK and set up discussions with the relevant local authorities to learn more about how changes in place management approaches are funded and delivered.

[10] Brighton Destination Report, Kubi Kalloo and Quadrangle for VisitEngland. Undated. Research carried out between April 2015 and September 2016.

6 CONFERENCES

Business tourism is high value. Prestigious events give the city a positive profile in the marketplace nationally and in Brighton & Hove's target industries. Conferences can showcase local talent and cutting-edge research, exposing local businesses to national and international business markets. The economic vitality of Brighton's tourism is dependent on maintaining and supporting conference tourism.

Conferences are all about bringing together people to share knowledge, exchange ideas and develop new working collaborations. There is a strong synergy between those objectives and the positioning of Brighton & Hove as "a free thinking city" and an opportunity to use conference tourism as a platform for the place brand. Conferences are an important part of sustainable growth.

ASSOCIATION CONFERENCES
Association event delegates spend more than other types of conference visitor and are more likely to extend their stay for a leisure break.

International conference delegate spend per head per trip £1,021
UK conference delegate spend per head per trip £448.

Source: Business Events Research 2016. VisitBritain and Strategic Research International

Brighton has a wide range of conference and meeting facilities and a long history and reputation of holding business events. The Brighton Centre is the showcase venue with a capacity of 4,400 in the main auditorium but the city hosts conferences and business events in a very wide range of venues from hotels and academic institutions to sports and cultural venues. The commercial success of these venues relies to some degree on conference business. Conferences support the volume and viability of the large number of hotels in the city because they deliver weekday business, frequently at times of year when fewer leisure visitors come. Brighton has carved a successful niche within the high value association conference market.

The importance of conference tourism is recognised through the way city partners work together to secure and deliver conference business in the city. Brighton has a reputation for delivering a professional, city-wide (Team-Brighton) experience for organisers and that reputation underpins and sustains repeat business and word of mouth recommendation.

Looking to the future, the city has some competitive positioning opportunities:

- Easy access from London and from Gatwick.
- Its seafront location that enables it to integrate health and wellbeing into event programmes to meet the needs of the Millennium conference goer looking to develop different and creative ways to engage with fellow delegates and exhibitors, e.g. morning yoga, event runs and local walks.
- A loyal and supportive client base built up over the years with opportunities to further nurture these ambassadors and share their experiences.

But the city also faces some challenges:

- Brighton & Hove has very few large corporate businesses with headquarters or regional offices in the city – that means limited homegrown demand for conferences and business events.
- Despite punching above its weight in conference tourism, it is being outspent by many of its major UK rivals. With a similar population and similar sized venue, Visit Belfast for example has an operating budget of £3.6m.
- Brighton's awareness among international buyers could be stronger and current levels of awareness are not translated into bookings.[11]
- There is a growing supply of conference venues that outstrips demand, e.g. a new conference centre in Aberdeen (due to open 2018), a major new venue agreed in Newcastle-Gateshead, major refurbishments to venues including Eastbourne (£50m) and at the Fairfield Halls, Croydon (£30m).
- The average size of an ICCA registered event has declined from around 800 in the late 1970's to around 400 in 2012. Nearly all events held in the ICCA database have fewer than 1000 delegates.

GROWTH OPPORTUNITIES

The growth opportunities are about deriving added value from existing market and sector strengths and using Brighton's proximity to London creatively and productively. They are also about ensuring conference activity reinforces Brighton & Hove's sector strengths. The target is to narrow the gap between the proportion of business visitors to Brighton & Hove (10%) and the all England average (14%)[12]. Achieving that will add an additional £8-10m into the local economy from domestic business visitors and a similar amount (circa £10m) from international visitors.

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[11] VisitBritain research shows London achieves 90% awareness of its conference offer, Brighton managed just 28% putting it in 7th place of destinations surveyed. 62% of all conference visits are to London and just 7% to the South East. The International Congress & Convention Association (ICCA) data places London 5th globally in the ICCA league table while Brighton manages 279th.

[12] Great Britain Tourism Survey. 2016. Kantor TNS. International Passenger Survey. 2016. Office for National Statistics

The main focus remains association conferences because Brighton has developed experience and competitive advantage. In addition:

- To develop **London as a source market for corporate business –** to attract some of this business to Brighton, taking advantage of good transport links and a seaside location.
- To position **Brighton alongside London for targeted international buyers** who are currently only considering the capital – playing to Brighton's location, access and sector strengths**.**
- To **exploit London Gatwick -** targeting international opportunities served by airlines operating out of Gatwick.
- To exploit **Brighton as a compact conference destination** - the event can become embedded in the city and the conference 'owns' Brighton for a few days. That means working with businesses to deliver a bespoke welcome and dressing the city for specific conferences.
- To work more closely with **the universities and with key industries** to nurture new events and bring them together to bid for international events to develop a proposition that takes advantage of the rich **digital and creative clusters in Brighton** and better engages with it**.**
- To call out the international standing of the research, thinking and innovation in the city's institutions and businesses.
- To develop a **distinctive conference experience** that encourages conference businesses to use the brand in its sales and marketing.

However, to achieve that growth requires delivering contemporary venues that meet what conference buyers want in a highly competitive marketplace. The main venue is the conference showcase and must be able to compete alongside other UK venues. That means the main venue must deliver:

- **Flexible quality space -** of sufficient scale and quality to meet or exceed organisers requirements, compete with other venues in major UK conference cities and be capable of managing large scale entertainment events as well as conferences.
- **Good connections –** to all the city facilities – as a compact city, Brighton & Hove can deliver this through good transport and public realm design.
- **State-of-the-art technical infrastructure** – that is regularly refreshed to ensure it continues to meet organiser and delegate expectations.
- **Creative workspaces and networking areas** – that reflect the brand values and which foster inspiration and engagement between delegates.

The Waterfront Project creates the opportunity to deliver a new state of the art conference venue with these facilities at Black Rock. The location must also deliver the business buzz that communicates the city's intellectual credentials and sector strengths. It must be a new quarter of the city, with a corridor of activity and easy transport that links it with the city centre and the seafront.

7 MARKETING FOCUS

To achieve sustainable tourism growth in the longer term, the city's tourism marketing communications will:

- **Target priority markets** as tightly as possible – this should strongly influence the creative approach and ideas, the content and the channels.
- **Use the brand** consistently and creatively – and encourage, support and enable others within the council and the city to use the brand and promote the brand values too.
- **Involve partners beyond tourism in marketing the city** – to increase resources and channels and have greater impact.
- **Work with organisations and attractions beyond the city** itself to reach target visitor markets – strengthening the product offer and increasing marketing resources and reach – developing new itineraries and experiences and benefiting from partners' routes to market.
- **Develop and deliver creative campaigns –** to position Brighton as a place for "culture" and "wellness".

These are the practical actions for the short to medium term:

- Review current marketing content and channels in the light of priority markets.
- Apply the destination brand values to current marketing content – prioritise and foreground content that highlights the brand values.
- Set up a City Marketing Group that brings together the key organisations promoting Brighton & Hove as a place to invest, live and study as well as visit and meet – to review and develop a place brand and to identify areas to collaborate on marketing communications where it makes sense to do so.

8 DELIVERING THE PLAN

RECRUITMENT, JOBS & SKILLS

Brighton & Hove has around 21,000 tourism jobs[13]. Like the rest of Britain, and London in particular, Brighton's travel and tourism industry relies on employing a significant number of immigrants. Any changes limiting the sector's ability to recruit or employ foreign nationals, including those from the EU, could challenge many travel and hospitality businesses in Brighton & Hove filling a number of roles. This situation is likely to be made acute by the current high levels of UK employment, existing skills shortages and poor perception of tourism as a career choice.

> EU nationals comprised 11% of the total workforce. As unemployment fell from 8.1% to 5.4% between 2011 and 2015, the percentage of EU nationals being employed by the tourism industry increased to 46%.
> As fewer UK nationals become available with the skills required, the industry grew increasingly dependent on foreign labour.
>
> *People 1st/Tourism Alliance*

There are no quick fixes to these challenges but businesses in Brighton & Hove are already finding it hard to recruit as numbers of available EU workers begin to decline. There is a need for short as well as long term action. There are two areas to consider:

- Sourcing skilled employees – which is a current and ongoing challenge.
- Developing a skilled workforce – how the soft skills needed for tourism can be better appreciated and taught, what industry incentives will be needed to train and retain employees, the implications on business costs and subsequent competitiveness of the sector.

Because the scale of the challenge is big in Brighton, the city needs to be in the vanguard of piloting new schemes and programmes to generate more employment now. That means:

- The different Council departments and the different training and skills providers in the LEP area becoming much better connected; sharing information and knowledge to draw up a more accurate picture of the immediate and medium-term challenge, identifying the pinch-points and agreeing action.
- Setting up a tourism skills group – potentially as a working or sub-group of a city region wide skills group – with industry, skills organisations and local authority representatives. The group will be charged with developing and overseeing the strategic implementation of a Tourism Skills Plan. This needs to be undertaken as part of the new city delivery structure. The Plan needs to work for Brighton & Hove and the region. It should include the input of major players in the industry e.g. Gatwick Airport, major hotel chains with strong representation in the region.

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[13] The Economic Impact of Tourism Brighton & Hove 2016, Tourism South East

- Brighton & Hove City Council working with destinations where the challenge is of a similar scale including working with London to lobby government and to bring forward suggested programmes and projects for pilot funding.

Potential solutions to the skills shortage that have been put forward for consideration by The Tourism Alliance and which might offer opportunities for Brighton, are:

- To expand the TIER 5 Youth Mobility Scheme which allows young people from some Commonwealth countries to work in the UK. This could be enlarged to include EU countries so that EU nationals could apply for a visa to work in the UK for two years before they turned 27.
- For funding to incentivise the delivery of tourism programmes and tourism apprenticeships rather than those schemes being directed to STEM sectors.
- To relax the rules governing the ability of overseas students in the UK to work in the industry while they are studying.

The third of these options could have immediate impact. All these approaches require government intervention but there may be opportunities to pilot these and other ideas.

The Tourism Industry Council[14] are working with government to establish a Tourism Sector Deal which is looking at four areas: Connectivity, Productivity, Tourism Action Zones and Skills. If established the Deal will be instrumental in delivering a 10-year tourism hospitality and skills campaign. The current discussions on Tourism Action Zones are to create large zones, for example aligning with LEP boundaries. Brighton & Hove has the potential to be the city at the heart of a new Tourism Action Zone. The objective is for the zones to deliver ongoing tourism funding to support sustainability of the sector. Given the significance of tourism employment in Brighton & Hove and more widely in the Gatwick Diamond area, Brighton & Hove will explore the opportunities for Brighton & Hove to deliver a tourism skills pilot for England, working closely with VisitBritain and leading industry partners.

[14] The Tourism Industry Council is a collaboration between Government and the tourism industry focusing on improving the tourism sector including jobs, transport and de-regulation.

NEW WAYS OF WORKING

This strategy is about a new refreshed focus for tourism that delivers a sustainable sector for the future. For that to be successful requires a change in approach to the role and function of tourism. The sector must be strategically aligned with economic development and its role and contribution to the cultural life of the city better understood and supported. That means placing tourism centrally in the economic development of the city and positioning Brighton & Hove as the tourism city in a wider geography. That has implications for the role and remit of the Council's tourism team, its relationship with the tourism industry, with other departments in the Council and with other organisations in the city, regionally and nationally.

Brighton & Hove is looking at a new model for the City Council functions. Tourism needs to be a key part of that. This is not about carrying across current functions but about evolving the role of tourism from tourism marketing to place marketing and making tourism much more central to the city's policy and decision making and integral to place management. That means retaining current functions and introducing a new strategic tier that better enables the city to maximise the wider opportunities tourism brings to Brighton & Hove and to put the city in a much stronger position to access national and regional funds for tourism. There are several models for how this might be delivered. This approach is well established in larger cities and works well in Liverpool and in Manchester because there is clarity between roles and responsibilities. The model supports industry membership for marketing and promotional activity. Brighton & Hove is a smaller city; it needs a bespoke model.

Currently, VisitBrighton is delivering a professional marketing and sales operation. Its focus is market retention and market penetration. This is a valid strategy given the scale and importance of tourism to the city. It is also a successful model given the number and diversity of businesses using VisitBrighton's marketing services (530+), the rate at which they rebook the partner programme each year (80%+) and the continuing success of the convention bureau's sales in extremely competitive circumstances. The management of events at the Brighton Centre also seeks to balance commercial activity for the Centre, with activity which is good for the profile of the city and to deliver a mix of events which variously benefit hotels and places to eat. This is all achieved by a small team. The approach ensures businesses are engaged and served by VisitBrighton and creates a funding stream for activity.

VisitBrighton's industry partners are mostly looking for reliable short to medium-term returns on their investment. Significant departures from the current marketing programme could jeopardise support and income from partners, which would in turn reduce VisitBrighton's resources. In Manchester for example, their tourism model retains this element of industry engagement through Visit Manchester, which sits within Marketing Manchester.

In Brighton & Hove, the introduction of a strategic tier of tourism activity will mean an additional focus on product and market development – which is higher risk and slower yield. Return on this investment will be in years, not months, and is unlikely to come from SMEs and micro businesses, or from the national chains of tourism, hospitality and retail businesses. VisitBrighton will need to work with external stakeholders beyond tourism who have a vested interest in the city's long-term sustainable growth.

Looking ahead, tourism functions would sit in three tiers – strategic, transitional and tactical. The transitional tier is the first incremental steps towards new ways of working. This tier would disappear over time as roles and functions evolve. Here are the types of function that might be covered by each tier. This is illustrative and not fully comprehensive.

Strategic

- Promoting Brighton on national and international stage to visitors, inward investors, conference organisers and students.
- Representing Brighton's interests on key regional and national tourism platforms
- Bidding and securing external tourism funds
- Developing new strategic partnerships regionally and nationally

Transitional

- Moving towards more comprehensive use of the brand by VisitBrighton and partners
- Broadening out to engage new city parners in tourism activity
- moving marketing focus towards their prioirty markets

Tactical

- Tourism marketing plan
- Promotional campaigns
- Engagement with tourism businesses and membership
- Liasion on day-to-day place management e.g. litter collection, event management

The new model for tourism needs to be designed to work with the new model for the city and implemented alongside it.

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