



# **Chichester District** **Destination Management Plan** **2019-2023**



***2019-2023 - To position Chichester District as:***

**A first-class year round destination; showcasing the natural beauty of the countryside & coast, while celebrating the quality of the heritage and cultural experience of the city, towns and events.**

  
**GO TO PLACES**  
 January 11<sup>th</sup> 2019

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Front cover images: West Wittering Beach, Petworth, SDNP, Goodwood Circuit, Cowdray Polo, Uppark, Chichester Festival Theatre, Chichester Cathedral

# Context

The purpose of this Destination Management Plan (DMP) is to establish a framework to grow the visitor economy; building on the strength of the product to increase the District's share of overnight stays and day visitor expenditure.

## The Destination Management Plan:

- Is a living document which will help stakeholders understand where they fit into the wider destination landscape, and how they can benefit directly from a coordinated approach across the District.
- Sets out a new direction for the destination, based on visitor and business needs, while making best use of the resources and expertise available.
- Lays the foundation that is needed to unify the destination and redefine the role of Visit Chichester, through an action plan that is ambitious but achievable.

This 5-year plan has been developed alongside the current 'vision' documents for Chichester city, Midhurst, Petworth and Selsey and takes into consideration the strategic objectives for the South Downs National Park. The document also draws on extensive analysis of existing research, to build an evidence base to understand current performance; visitor and business insights; identification of local issues; external trends and competitors.

Throughout the process, there has been ongoing consultation with both the public and private sector, via 1-2-1 interviews and regional workshops held in Midhurst, Chichester and Selsey. This consultation has brought together representatives from Chichester District Council, West Sussex County Council, Chichester BID, attractions, event organisers, the accommodation & hospitality sector, district vision groups and the national travel trade.

The project steering group, comprising both public and private sector organisations has been consulted at key stages to ensure the content is representative of the entire district. This group will continue beyond the delivery of the destination plan, in the role of a strategic advisory board to oversee the delivery of the Visit Chichester business plan and delivery of DMP recommendations.



*Images: West Wittering Beach huts, SDNP, Cowdray Ruins, Chichester City Centre*

# Executive Summary

## *The value of tourism in Chichester District*

 <b>6.22 million</b> Day and overnight trips	 <b>£411 million</b> Day and overnight visitor value	 <b>8,037 jobs</b> Visitor economy = 14% of all employment
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*Chichester District Economic impact study 2015 – Ref: Appendix 6.1 Secondary research report – section 2.1*

Chichester District has exceptional product, award winning beaches; a strong countryside and outdoor experience, supported by a National Park and extensive AONB; a rich heritage offer; internationally recognised events and a vibrant cultural product that has potential for growth. The breadth of the city, countryside and coastal experience consolidated into one district, offers an almost 'condensed' version of England within 1.5 hours of central London.

Given all this, the District still faces seasonal challenges; a high percentage of day visitors, with an average to low spend per head and only 10% of trips resulting in an overnight stay. In a nutshell, Chichester needs people to stay longer and spend more if the district's visitor economy is to grow by the forecasted 3.8% year on year\* in-line with national tourism growth predictions.

\* VisitBritain growth forecast for the visitor economy to 2025 Ref: *Tourism: jobs and growth. Deloitte November 2013*

There is a recognised need to unify the tourism offer; working together to deliver a strong destination brand that delivers a quality experience, which engages the best prospect visitors, while meeting the needs of the business community. To do this, the District has to be seen as a whole, rather than a 'dip-in dip-out' day visit list. This will require greater partnership working and redefining the role of Visit Chichester as the central Destination Management Organisation (DMO) to ensure the destination message is heard and to avoid duplication.

Continual visitor engagement is essential; positioning Chichester District as a year-round destination, in an attempt to alleviate pressures on infrastructure and bed stock around peak season and flagship events. Focusing consumer marketing on extending the season using thematic interests such as outdoor and cultural heritage, and repositioning the retail offer around the independent, art and social experience all work towards addressing this challenge. Engagement with the travel trade and sector-specific areas such as luxury also play to the district's strengths and engage international visitors who are looking to explore beyond London.

From the outset, this plan is about delivering value to the district's tourism industry, ensuring they see the benefit for their businesses. This is a living document, designed to be translated into a business plan with set benchmarks to measure success and a sustainable funding model.

The following plan focuses on the challenges and opportunities facing the district, recommending six core objectives that underpin the aim to align with the national 3.8% year on year growth target by 2023. By delivering an achievable action plan through four core workstreams, Visit Chichester can stay focused on key performance indicators such as visitor spend, audience reach and growth in overnight stays while building a strong destination brand.

### **DMO Core Objectives 2019 - 2023**

1. Increase day visitor spend and dwell time
2. Convert day visits into overnight stays
3. Attract visitors from a wider catchment area
4. Deliver a strong and distinctive brand
5. Increase visitors outside peak season
6. Work in partnership to create a healthy visitor economy



# 1. Where are we now?

## 1.1 Setting the scene for the next 5 years

The core objective of this Destination Management Plan is to position Chichester District as a first-class year round destination; showcasing the natural beauty of the countryside & coast while celebrating the quality of the heritage and cultural experience of the city, the towns and events.

Tourism is a hugely important yet competitive sector; Chichester's competitor regions are increasing their investment to make their product stand out in order to engage and retain the ever-demanding visitor. Chichester as a District has all the right components to enable it to compete, benefiting from a portfolio of area brands and high profile events that have national and international recognition.

However, these strengths can be a double edge sword; when a region has visitor hot spots, it can lead to a 'dip in/ dip out' day trip offer, often resulting in isolated or low spend per head that is seasonal. This type of visitor engagement is notorious for placing increased pressure on the transportation network and accommodation base in peak season.

The visitor has also changed in the last 10 years, not necessarily in age profile, but how they wish to engage with a destination. Across the segments they look for experiences that are both memorable and personal, sharing them with family and friends. They no longer wish to be seen as a tourist, but as a local, having instant access to the latest information, calling on 'peer-to-peer' reviews that inform and reassure their choices.

Technology has changed the way the visitor engages with a destination, creating no single route to reach them. As a result we need to ensure that a strong consistent destination message is placed where the visitor is most active: social media, review sites such as TripAdvisor, booking.com etc.. Given this, and the fact that Chichester's tourism sector is made up of large as well as small and micro-business, indicates that a DMO offering business support in this area would add great value.

In order to grow the visitor economy it is crucial to position the District as an overnight stay/short break destination. There is a need to extend dwell time in the city, to support the retail and early evening economy, alongside this, the District needs to be positioned as a touring base to explore the condensed offer of countryside, coast, city, heritage, culture and sport.



Images: SDNP, Bosham, Petworth, Goodwood Racecourse, Chichester Cathedral, Chichester Festival Theatre

## 1.2 Putting tourism in context

### 1.2.1 The National Picture – England

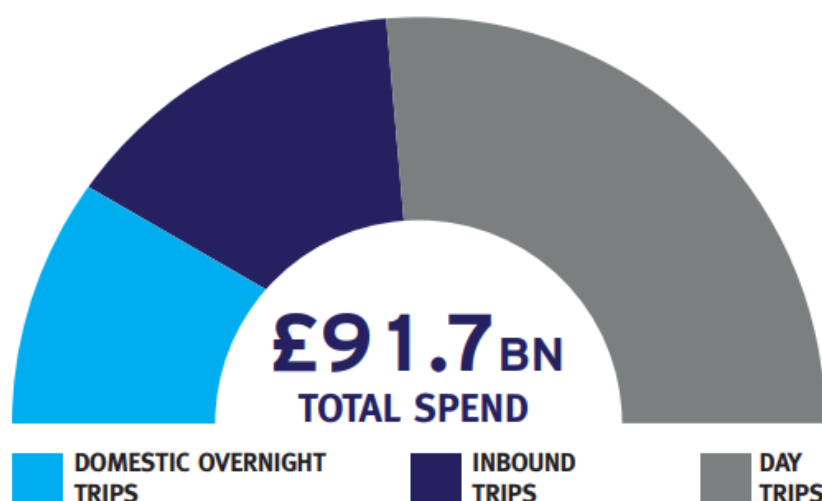
On a national level, tourism generates £106 billion a year to the economy; employs over two million people and supports hundreds of thousands of businesses. The sector is predicted to grow at an annual rate of 3.8% through to 2025 with a predicted value of £257.4bn representing almost 10% of UK GDP.

The following graphic highlights the distribution of spend for day trips and international/domestic overnight. This is followed by a breakdown of purpose of visit for the international and domestic markets in relation to holiday, VFR and business travel.

## Tourism trips and spend

# £91.7 BN

Was spent on tourism in England in 2016



**DOMESTIC OVERNIGHT TRIPS**  
**£18.5 BN**  
Source: GBTS 2016  
**NUMBER OF TRIPS**  
**99.3 M**  
Source: GBTS 2016

**INBOUND TRIPS**  
**£19.7 BN**  
Source: IPS 2016  
**NUMBER OF TRIPS**  
**33.0 M**  
Source: IPS 2016

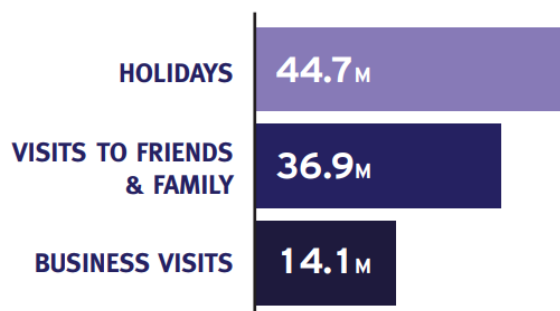
**DOMESTIC DAY TRIPS**  
**£53.5 BN**  
Source: GBDVS 2016  
**NUMBER OF TRIPS**  
**1.6 BN**  
Source: GBDVS 2016

- **International overnight:** 2016 England received 33 million international visitors with an expenditure of £19.7 million. This accounted for only 2% of overall trips but carried 21.5% of spend.
- **Purpose of visit (International):** Leisure holiday 37%, Visiting Friends and Relatives (VFR) 32% and business 23% - the remaining 8% includes study etc.
- **Domestic overnight:** 2016 domestic trips account for 99.3 million trips with an expenditure of £18.5 bn. This accounted for 6% of overall trips with 20.5% of spend.
- **Purpose of visit (Domestic):** Leisure holiday 45%, VFR 37% and business 14% - the remaining 4% includes study etc.

VisitEngland Key Facts & Trends 2016 Ref: International Passenger Survey 2016, GB Day Visitor Survey 2016, GB Tourism Survey 2016

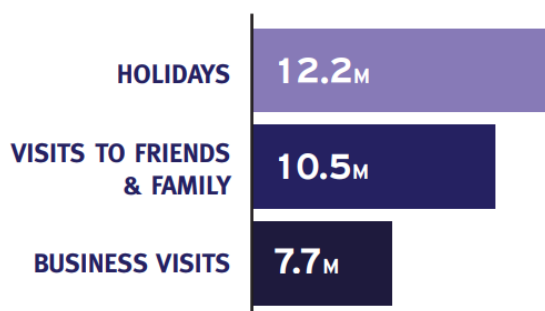
## Domestic Overnight Tourism

In 2016 there were:



## Inbound Tourism

In 2016, Inbound visits to England included:

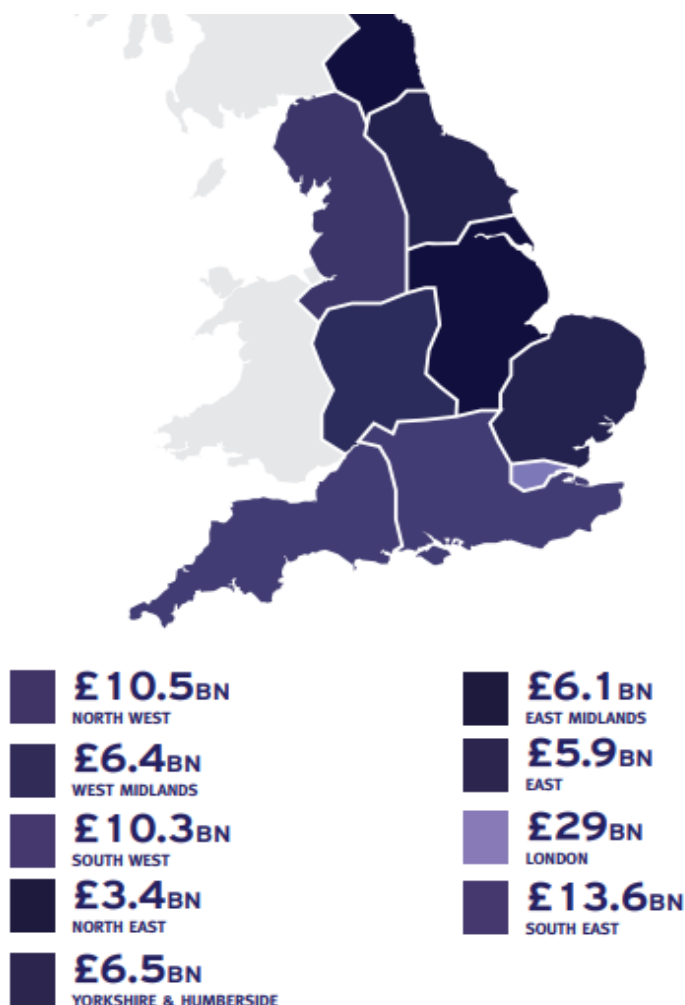


Ref: International Passenger Survey 2016, GB Day Visitor Survey 2016, GB Tourism Survey 2016 - VisitEngland Key Facts & Trends 2016

### 1.2.2 The Regional Picture – South East England

Outside of London the SE of England is the 3rd most popular UK travel destination (Trips), benefiting greatly from the day visitor market and international visitor excursions out of London. However, the SE is 2<sup>nd</sup> in relation to tourism spend with £13.6 bn in tourism expenditure from day visit and International/ domestic overnight.

#### Breakdown of regional spend 2016



Ref: International Passenger Survey 2016, GB Day Visitor Survey 2016, GB Tourism Survey 2016 - VisitEngland Key Facts & Trends 2016

## 1.3 The Chichester District Visitor Economy

### The District Picture *(with comparative data)*

Chichester District Visitor Economy 'Dashboard'		2015 Chichester district	<b>2015</b> <i>Canterbury</i> <i>Comparative data for a heritage city district</i>
Total Visitors		6,171,000	7,220,000
Total Economic Value		£411,400,000	£453,865,700
Total Employment		8,037 (5,810 ft) (14%)	9,378
Total Day Trip		5,657,883	6,571,000
Total Overnight Trip		571,053	649,000
Total Day Expenditure	58%	£189,200,000	£215,205,000
Total Overnight Expenditure	42%	£132,282,000	145,983,000
Domestic Overnight trips	78%	447,701	470,000 (73%)
Overnight International trips	22%	123,352	179,000 (27%)
Overnight Domestic spend	54%	£76,131,324	£77,064,000 (53%)
Overnight International spend	46%	£56,150,214	£68,919,000 (47%)
Spend per person - Day		£33.32	£32.75
Spend per person – Overnight (based on av. 4.1 nights stay)		£231 (£56.34 per day)	£224.94 (54.86 per day)

Ref: Appendix 6.1 Secondary research report – section 2.1, Chichester District Economic impact study 2015

#### Key Insights:

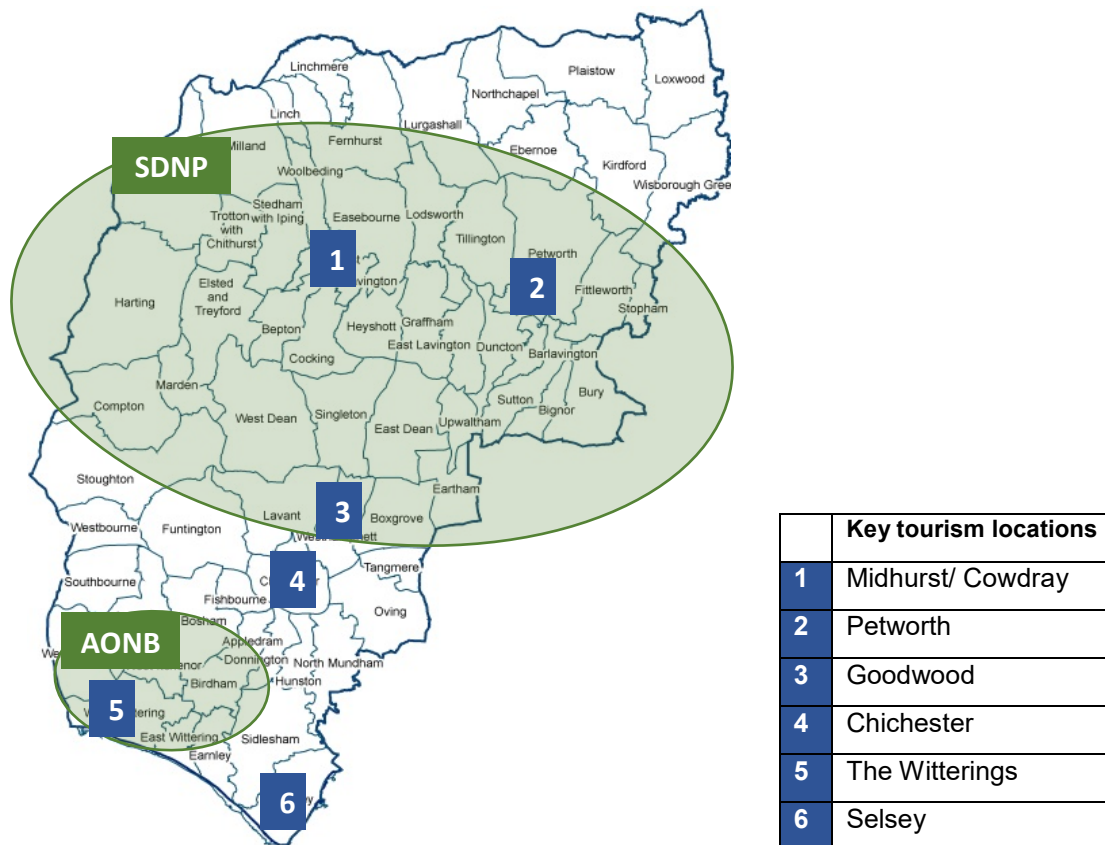
- **Day trip** visitors account for 90% of all tourism trips to the district, but account for 58% of visitor expenditure in destination, with an average spend per day of £33.32 - the SDNP research shows day visitor expenditure is considerably lower (£9.50).
- 10% **overnight trips** account for 42% of visitor expenditure, of these overnight trips **international** visitors represent 22% but account for 46% of expenditure.
- Average spend per day of an overnight international visitor is £111 whereas their domestic overnight averages £41.46.
- International visitors (overnight stay) spend over 2.5 times their domestic counterparts.
- Comparative data shows that growth from 2009-2016 was moderate. Although both day and overnight trips have shown growth, rate of expenditure is slower... **more visitors who are spending less.**
- Visitor profile indicates 95% domestic and 5% International (Germany, France, Spain, Netherlands, USA)
- **Over 55s dominate**, followed by the family segment. This is reflected in the SDNP visitor survey where 25% of parties included children under 16 and 32% included 45-59 year olds.
- Seasonality is an ongoing issue, which puts additional pressure on capacity during peak season. However, market demand for Chichester District Airbnb has seen a 60% annual growth with active hosts at 726 and active rentals at 1057 (as of Sept 2018).
- Products that have a level of recall with the visitor are *(in no particular order)*: Coast/ countryside/ walking/ heritage city/ high profile events.
- **Product areas with low awareness** (i.e. undersold): Food & drink, rest & relaxation, outdoor activity range, luxury/quality/ bespoke, cultural offer and opportunities around music events.
- **Key motivational trends** that should be utilised: The desire for experience focused activity, personal recommendation and VFR (Visiting friends and relatives), shared experience with friends and family, wellbeing, local provenance and feeling like a local.



## 1.4 Capacity and Demand - based on current data.

The District currently has **pockets of recognition** rather than being recognised as a whole destination. This often results in quite localised visitor engagement and reinforces a day visit offer rather than short break. The following map highlights these areas.

### Overview map of key tourism areas



**1.4.1 Seasonality:** This is a national challenge for any destination that has either a strong countryside or coastal product; the fact that Chichester has both does compound the issue, affecting bed capacity and transport link infrastructure during peak season and employment during the winter months. In addition, the District has a series of product hot spots. Their appeal is such that during peak season, traffic to and from areas like the Witterings and Goodwood events can place pressure on the road network.

**1.4.2 Accommodation:** The 2016 TSE accommodation audit indicates the district has a capacity for 19,000 bed spaces of which approximately 75% were in the caravan/camping/holiday park category located in the coastal areas. Of the remainder, 17% were hotel/guest house/B&B/pubs with rooms. The VisitEngland accommodation audit puts the bed space capacity for campsites and parks closer to 85%.

The reality is that the overnight stay market is heavily leisure driven and seasonal, characterised by strong weekend and summer demand creating a shortage at peak times, whereas mid-week and off-peak has capacity.

- Data shows that Coastal West Sussex occupancy reached 64% in 2015, up from 57% in 2007.
- By comparison, occupancy in the South East was 71% in 2015, up from 56% in 2007. In England occupancy was 63%, the same as in 2007.

Ref: Appendix 6.1 Secondary research report

One of the key outcomes around the capacity and demand dilemma is the district growth of Airbnb, as of September 2018 the available Airbnb rentals were over 1000 with 84% occupancy. This now noticeably outstrips the District's traditional self-catering sector.

Further studies conducted for the Coastal West Sussex Partnership highlight the need for additional budget hotel development to support visitor numbers during peak season, also the lack of boutique hotels to support a year-round travel product targeting business and leisure travellers. Although there is a recognised demand for the development of hotel accommodation, there is also the need to review how and when, current products are promoted in order to extend the season.

**1.4.3 Major events:** In addition, accommodation capacity is stretched during the Goodwood flagship events - attendees often have to seek accommodation outside the district, often at larger chain 3 or 4 star hotels in Portsmouth/Southampton and the Reading/Gatwick area. Increasingly though, this need is being fulfilled more locally by Airbnb, with some hosts only offering accommodation around the events programme.

**1.4.4 City signage & retail offer:** Green space, coffee culture and the appeal of independent retailers are all seen as desirable to the consumer. As retail engagement habits continue to change; the visitor is actively looking for destinations that offer a more engaging leisure-orientated retail experience.

Chichester like many other UK heritage cities faces the challenge of encouraging visitor footfall away from the core streets. Areas such as the Cathedral gardens and the canal can be overlooked by first time visitors and it can be difficult to find even the centrally based cultural institutions such as the Pallant House Gallery. A review of current way-marking and the delivery of an engaging destination brand at points of entry e.g. coach parks, needs a review to ensure the visitor is informed and engaged.

**1.4.5 The opportunity from music tourism –** The number of people who enjoyed live music events in the UK rose by 12% in 2016 to 30.9 million, where the average spend by a domestic music tourist was £150 with international visitors spending considerably more. This product area has growth potential for the district, and would strengthen the quality cultural product already on offer by appealing to target segments. *Ref: UK Music Report – Wish you were here 2017*

## 1.5 Challenges & Opportunities

**1.5.1 The need for a stronger, more encompassing Destination Brand-** At present the Visit Chichester Brand is seen as non-representative of the District-wide destination. It is perceived to be city focused, doing little to champion the distinctive areas within the region. A new brand framework and identity would galvanise the different areas and capitalise on the strengths of leading organisations and attractions that have high visitor awareness. Fundamentally, the delivery of a new brand has to offer 'share of voice' while packaging the district experience to appeal to the customer.

**1.5.2 The seasonality issue** – Although the district attracts visitors throughout the year there is a seasonal hiatus during the summer period leading to significant traffic congestion. This is mirrored in accommodation capacity during peak season and surrounding key events such as 'Festival of Speed'. When visitor numbers skew significantly towards one season it has an adverse effect on employment and business cash flow.

**1.5.3 Addressing the balance of overnight versus day visits** – In comparison to the England-wide figures of day trips to overnight stays, Chichester is underutilised for short breaks. Over 90% of District visits are day trips; this has a significant effect on the value of the District's visitor economy. Raising the profile of the wider district experience, underpinned by quality and value will encourage the visitor to explore further and stay longer.

**1.5.4 Product and area recognition**– The District benefits from strong product recognition around attractions and areas like Goodwood, the Witterings and Chichester City/Cathedral/Harbour. However, this also creates 'product pockets' – these attractions and areas are often seen in isolation, where visitors find it hard to visualise travelling between locations or to conceptualise anything beyond the direct day visit.

**1.5.5 The need for greater partnership working** – Working in partnership will strengthen the delivery of a district wide destination brand, it counters fragmentation and duplication of marketing spend, and creates opportunities to bring thematic campaigns to life such as showcasing the 'luxury and bespoke product' that would appeal to the high net-worth consumer or the meetings and incentives market.

**1.5.6 The need to visit now** – As with many destinations that lead on built heritage or natural beauty, there is often a lack of immediate call-to action... i.e. 'I can visit the Cathedral or the South Downs next year, as it won't have changed'. In order to be heard above the competition, the marketing messages need to raise the visitor's awareness of festivals and events beyond the headliners, raising the profile of food & drink and the uniqueness of the shopping offer from city centre independents to regional town's arts and interiors.

**1.5.7 Packaging the experience to increase dwell time** – The quality and value of the product is often under-played when promoting the destination. For example the Cathedral, the Novium Museum and the Bishop's Palace gardens offer three great visitor experiences all free of charge, and could be easily packaged alongside retail, culture and dining to both the independent and group visitor.

**1.5.8 Visiting friends and relatives and working with local resident ambassadors** – Approximately 1/5 of visits to the district are visiting friends and relatives (VFR), often resulting in a day out or an away from home dining experience. VFR visitors tend to spend more per head and have a high propensity to repeat visit, therefore working with local residents as destination ambassadors is an opportunity.

**1.5.9 An effective Destination Management Organisation (DMO)** – Visit Chichester as the lead DMO has been through considerable change over the past 5 years. There is a need to build on the current delivery by developing a new partnership model.

## 2. Where do we want to be by 2023?

### 2.1 Strategic Objectives

The focus for the destination plan is economic growth. National forecasts predict tourism sector growth at an annual rate of 3.8% through to 2025; therefore Chichester needs to have the ambition to increase market share of best prospect day visitors and the volume of overnight stays, to achieve growth in line with national average.

In the first instance, the focus needs to be on building the resources and redefining the role of Visit Chichester and establishing a strong destination brand so that delivery can directly support economic growth.

Building on the challenges and opportunities highlighted in section 1.5, Visit Chichester needs to focus on the following core objectives if it wants to increase market share for economic growth.

Objective	Overview
<b>1. Increase day visitor spend and dwell time</b>	<ul style="list-style-type: none"><li>Recognising key day visitor groups such as Local residents/Visiting Friends and Relatives; Repeat visitor engagement.</li></ul>
<b>2. Convert day visits into overnight stays</b>	<ul style="list-style-type: none"><li>Repeat visitors, positioning the product as 'more than a day' visit across print, digital, social media and PR.</li><li>Work with key product themes to engage the consumer in different ways.</li></ul>
<b>3. Attract visitors from a wider catchment area</b>	<ul style="list-style-type: none"><li>Targeting visitors from South West London for both day visit and overnights.</li><li>Engaging the Travel Trade to encourage domestic and international visits.</li></ul>
<b>4. Deliver a strong and distinctive destination Brand</b>	<ul style="list-style-type: none"><li>Building on core product values (Natural, Authentic, Experience, Fun), develop a Destination Brand that showcases the District's strengths as a whole experience.</li></ul>
<b>5. Increase visitors outside peak season</b>	<ul style="list-style-type: none"><li>Working with key accommodation providers and attractions to showcase out-of-season breaks by targeting key domestic and international segments.</li><li>Reaching potential visitors via 3rd party content partnerships e.g. Expedia.</li></ul>
<b>6. Work in partnership to create a healthy visitor economy</b>	<ul style="list-style-type: none"><li>Develop a strategic partnership framework that enables Visit Chichester to support the small/micro-tourism businesses as well as showcasing the core attractions and areas.</li><li>Develop proactive marketing activity working with stakeholders, travel trade and strategic partners to position Chichester as an engaging year-round experience.</li></ul>

# Target Audience

## 2.2 The Domestic Visitor

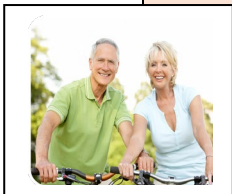
The following segments are the best prospect visitors in relation to visitor spend, and also have a greater potential to shift from a day visit to overnight stay, although this doesn't exclude other segments such as the retirees or the youth and student travel market.

For all of the segments below, the goal is extension of stay, turning a day visit into a one or two night break. This can only be achieved by packaging and cross-promoting different areas within the District, placing an emphasis on quality, value, experience and how easy it is.

### Underlying message:

**'Too much for one day, so why not stay?'**

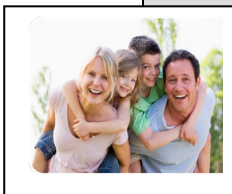
#### Country Loving Traditionals



- Kids are at Uni/ over 21. Keen to take multiple short breaks per year and probably have already visited the district. They love the heritage but are also interested in the cultural offer and can be great advocates for word of mouth promotion. They are looking for good quality accommodation, leisure shopping, food and drink and a little bit of relaxation .
- Press, Social Media - mainly facebook and Twitter
- Current visitor surveys indicate that this group makes up a large % of the Districts day visitor market within a 15-30 mile radius.
- *Generally over 50 - they are already coming and represent the largest travel segment in the UK.*

*VisitEngland 2016 segmentation - Country loving traditionals 30% of UK market*

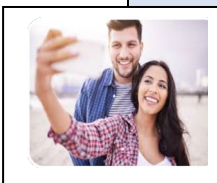
#### Aspirational Families



- Information hungry, this is a segment that wants information at their fingertips. Based in London/ SE/Home counties they are looking for day trips and short breaks that engage, educate, entertain and are easy!... They love Horrible Histories TV.
- They love events and activities where they can really experience the destination like a local.
- They love to boast on social media about what they do as a family!
- *They can be encouraged to stay longer and repeat visit.*

*VisitEngland 2016 segmentation - Aspirational Families - 12% of UK market*

#### Free & Easy Mini Breakers



- Time poor but still manage to plan and get away, more likely to be young, free and single. They love something different and look for insider info.
- They tend to book travel and accommodation (*love Airbnb*) but then 'wishlist' info about the destination so they can decide in situ.
- To gain their attention you have to give them a reason to visit. invite them to a gin festival, £5 polo ticket etc
- They are very active on social media, especially Instagram. They are also a fresh pair of eyes on the product and could play a major role in shifting perceptions about a destination.

*VisitEngland 2016 segmentation - Free & Easy Mini Breakers 26% of UK market*

*Ref: VisitEngland Visitor Segmentation – Product-centric segmentation for the domestic market Feb 2016*



## 2.3 The International Visitor

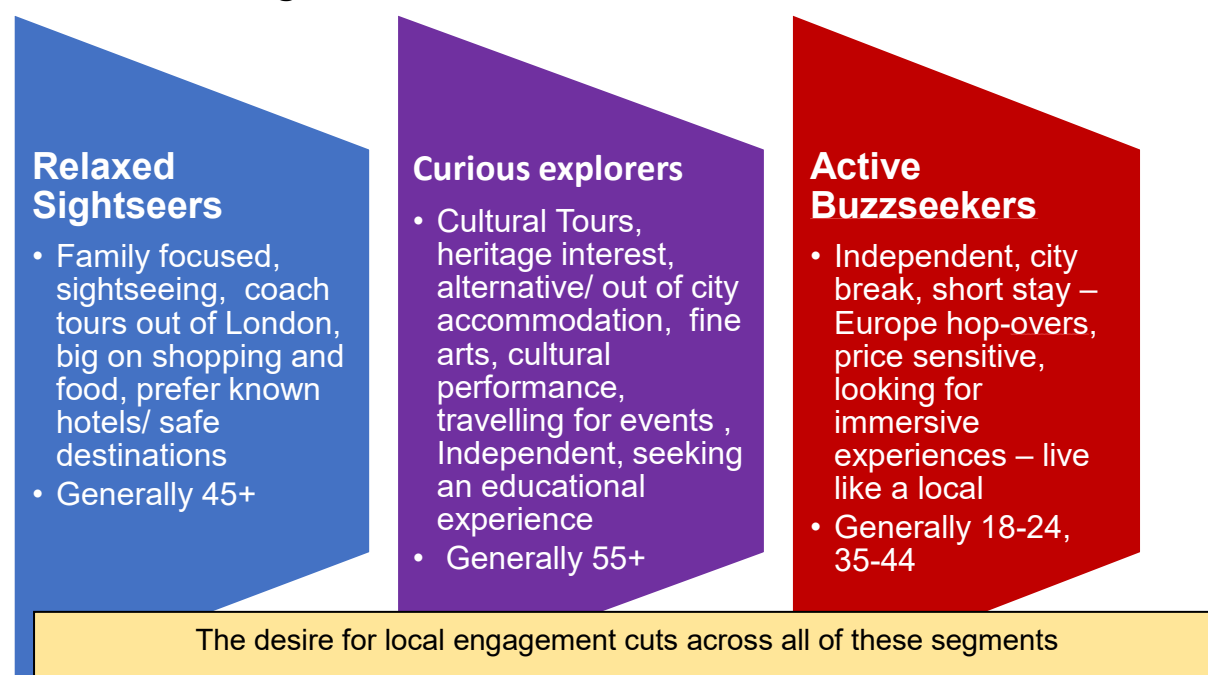
Although age groupings are referenced here, age doesn't define how a visitor interacts with a destination. It's all about attitude to travel, gaining memorable moments and not feeling like a tourist! Visitors now want to be recognised for their interests rather than their age.

The main difference with the international market is how they choose to travel, often opting to use coach excursions to explore the regions. For International visitors the focus is on raising awareness to choose West Sussex as well as Chichester, as their geographic knowledge is limited. They have a limited time frame, and want to experience as much as they can in the time they have.

**Underlying message:**

**‘England condensed in one District’**

### 2.3.1 Global Segments:



*Ref: VisitBritain Visitor Segmentation – Product-centric segmentation for the domestic market Feb 2016*

**2.3.2 Key Markets** - Priority international markets for Visit Chichester based on nation inbound visitor statistics and market growth opportunities for the next 5 years.

<b>Markets</b> (priority markets)	<b>Volume (% of all Visits to UK)</b> (inbound to UK-top 10 ranking position)	<b>Value (% of all Spend to UK)</b> (inbound to UK-top 10 ranking position)
<i>Primary for VC</i> <b>Germany</b>	<b>3<sup>rd</sup> (9%)</b>	<b>2<sup>nd</sup> (6%)</b>
<b>Netherlands</b>	<b>6<sup>th</sup> (5%)</b>	<b>9<sup>th</sup> (4%)</b>
<b>France</b>	<b>1<sup>st</sup> (10%)</b>	<b>3<sup>rd</sup> (6%)</b>
<b>USA</b>	<b>2<sup>nd</sup> (10%)</b>	<b>1<sup>st</sup> (15%)</b>
<i>Secondary for VC</i> <b>Australia</b>	<b>10<sup>th</sup> (3%)</b>	<b>4<sup>th</sup> (5%)</b>
<b>Belgium</b>	<b>9<sup>th</sup> (3%)</b>	-

*Ref: International Passenger Survey 2016 Top Ten markets by volume and value to the UK.*

## 2.4 Targeting the best prospect visitors:

**2.4.1 Looking after the day visitor/local market** – Although the aim is to address the balance between day and overnight stays, day visitors represent 58% of expenditure in the visitor economy and are key to sustaining a healthy retail environment. The goal for the day visitor is to increase dwell time, resulting in an increased spend per head.

Chichester city also attracts a high percentage of day visitors within a 20 mile radius. Therefore it is important that any promotion not only incentivises, but creates a reason to visit now, e.g. half-term offers to treat the grandchildren aimed at the 55+ segment. 'Bite & Browse' mid-week added value promotions encouraging shopping trips and 'get-togethers' over lunch.

**2.4.2 Encouraging overnight stays to coincide with available capacity** - Targeting the last-minute short breaks market from London during November to March – Heritage/Culture and retail – promoting the winter wilds of the Sussex coast or an Autumn walk and a cosy pubs in the SDNP. E.g. VisitScotland's Autumn campaign as a case study.

**2.4.3 VFR & Local Ambassadors**– With such a high proportion of day visitors travelling from within a 20-30 mile radius, working with local residents to incentivise VFR travel outside of peak season is a cost effective way to increase visitor numbers. Reaching residents via social media and working in partnership with local print publications can generate awareness of added value promotions.

**2.4.4 Working closely with the travel trade and group organisers to reach the International market** - By working with the travel trade, a destination can develop new product for delivery direct to market by both UK based ground handlers as well as developing bespoke itineraries for international groups and independents booking directly via an agent.

**2.4.5 Targeting the mass affluent (MA) and high net worth (HNW) visitor** - USA, China and United Arab Emirates are the UK's top three best prospect luxury travel markets. These consumers have a net worth in excess of £150k - £1m + in liquid assets; they are all looking for a unique experience and are driven by an underlying desire to engage with the historical, royal and traditional product. With high retail expenditure on personal goods and interiors, they will also up-spend to ensure unique accommodation and fine dining. They are heavily focused on London but there is the potential to work with luxury travel agents such as Virtuoso, to encourage short stay excursions built around the Petworth, Midhurst/Cowdray and Goodwood product.

**2.4.6 Capitalising on the meetings, incentives, conferences and events market** - Accounting for ¼ of inbound visitors and almost ⅓ of domestic overnight stays, the business traveller is a lucrative high-spend segment. Regionally the figures are lower, especially for heritage and rural based destinations; however Chichester District does have the type of product that appeals to the business meetings and incentives market.

A lack of boutique/ 4-star hotels will impact immediate growth potential, but incentive-based day visitor experiences are always of interest, at present the only Chichester product featured via VisitEngland is Goodwood.

There is also the opportunity to capitalise on the district's buoyant weddings industry by working with venues to encourage guests to extend their stay and see the local area.

**2.4.7 Development of targeted thematic and seasonal campaigns** that deliver direct to consumers positioning Chichester as a short break destination.

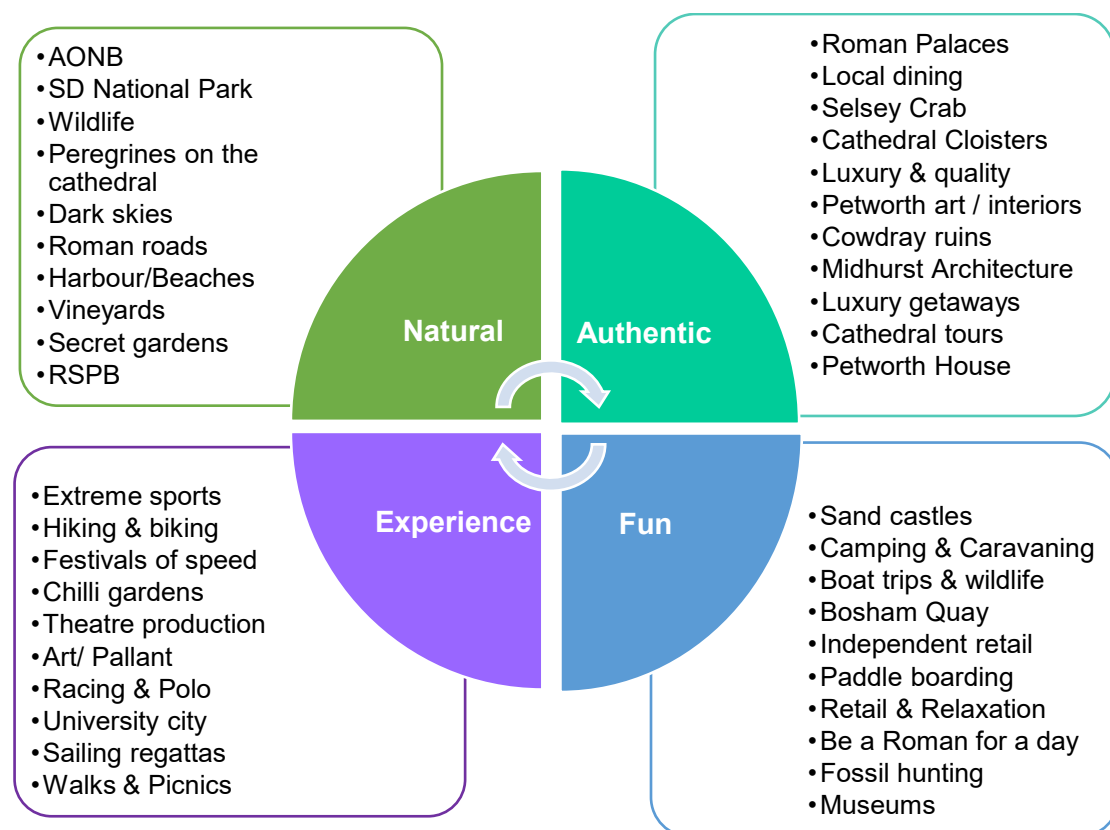
### 3. Engaging the Customer

#### 3.1 Product values that underpin the destination

The District has pockets of excellence from antique shopping to sailing; some of the county's most amazing Roman mosaics and England's youngest National Park. Equally, high profile events such as Goodwood Revival, have been enjoying international press coverage for over a decade, firmly placing them on the 'must go' event list.

Although recognisable, these products are often seen in isolation or in some instances somewhat detached from the district as a geographical locator. Therefore, there is a need to pull the product closer together; recognise the core values that sit behind them and use these values to help group areas, attractions and experiences together, to transform the visitor's 'days-out tick off list' into a 'must experience short break.'

**Figure 3.1.1** The following diagram shows how the 4 core values of Nature, Experience, Authentic and Fun are reflected in product across the whole district  
(Note, this is just a sample of District product)



**3.1.2 Core products values and emotional engagement** sit behind all destination communication. Today's consumer needs more than just the offer of attractions to visit and things to do. They want to experience the destination and have all the information at their fingertips so they feel like a local within seconds of arriving. Therefore, the emotional engagement, i.e. how a place makes you feel and meets your needs, is just as important as the unique heritage and natural beauty on offer.

#### 3.1.3 Recognising the visitors needs

How the destination makes the visitor feel is just as important. They want to 'feel' like a local, leave with fully charged batteries and have had an opportunity to reconnect with loved ones. When pitching the District as a short break the two key visitor needs are: **Reconnect and Recharge**

**3.1.4 What makes Chichester unique?** If Chichester District is going to stand out from competitors it not only has to fulfil these needs, but also has to demonstrate what makes the destination unique.

- How the destination fulfils a personal need e.g. **SPACE** to relax, breath, discover and come together with loved ones.
  - The countryside and coastal product supports this, SDNP, AONB, Nature Reserves, beaches, gardens, ruins etc...
- The **PACE** at which the visitor wants to engage. In Chichester this could be anything from 0-150 mph.
  - Due to the range of attractions, natural locations, historic towns and events on offer, the District can set itself as a destination where the visitor sets their own pace - strolling around Petworth antique shops or admiring the cathedral architecture to standing by the rails at the Goodwood circuit.
- How the visitor feels after visiting e.g. **RELAXED**, together, shared moments, good memories, good food and company; reconnected.
  - Fulfilling the visitors need to recharge and reconnect, leaving them feeling relaxed, is the baseline value to encourage repeat travel.

## 3.2 Building a strong Destination Brand

**Establishing core product values are the foundations for building a strong destination**

By establishing core product values that run across the whole region, this forms the basis for developing the Destination Brand.

**3.2.1 Fun** – Often seen as a fundamental component of any leisure time experience, this value underpins a whole variety of product whether its educational interaction at Fishbourne Palace by dressing up as a Roman, building sand sculptures at West Wittering or following the river to the Cowdray ruins.

**3.2.2 Experience** – This is a great product value that often sits behind events and activities that are time specific giving a reason to ‘visit now’; cultural delivery such as a ground-breaking performance at the Festival Theatre, or a new exhibition at the Pallant. It also allows an opportunity to challenge pre held perceptions about a destination.

**3.2.3 Authentic** – This is the bedrock of Britain’s appeal for international visitors, and it’s literally present in every location across the district with locations such as – Chichester Cathedral, Goodwood House, Petworth’s cobbled streets and Petworth house, the Novium Museum, Fishbourne Roman Palace and Bosham Church.

**3.2.4 Natural** – The SDNP, Cowdray and Goodwood estates, Chichester Harbour, East and West Wittering, Pagham Nature Reserve, The Bishop’s Palace Gardens, the AONB’s.... the list goes on. The USP is the variety in such a condensed journey time.

Overlay this with core themes such as culture, heritage, the great outdoors or food & drink and there is a potential to take a specific theme and use this as a core reason to travel, as demonstrated through ‘Go to Places’ Discover England Fund project, Gourmet Garden Trails.

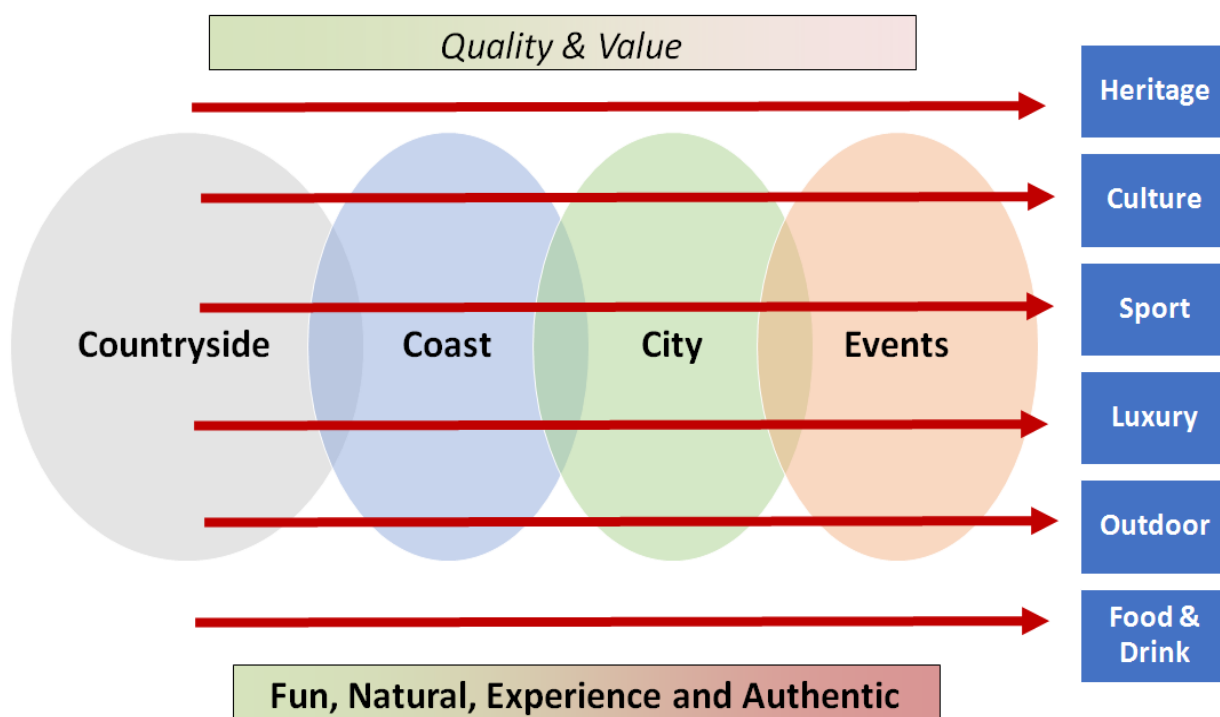
### 3.3 Thematic Product

Chichester's product not only fits within the countryside city & coast messaging, but also can appeal to the consumer under thematic headings such as culture, heritage and luxury, so enabling multiple ways to grab the potential visitor's attention.

Focusing on thematic messages also supports a District-wide message. Quality food and drink from Selsey crab to Petworth restaurants and South Downs Vineyards.

These thematic messages can be used to target specific segments/ lifestyle groups; they run across the whole district offer from countryside to events and are underpinned by quality and value, so appealing to all visitor budgets.

#### 3.3.1 Thematic messages that span the entire district



### 3.4 Product working groups

Due to the District's diverse range of product, there are several thematic strengths that could be used to engage different audience groups. The most effective way to develop these core messages is to bring together key representatives from the product area to form a working group.

Following on from the consultation workshops, it was clear that an instant win would be to bring together the cultural sector.

Other working group areas could be luxury, heritage or sport.

Thematic working groups are also a great way to kick start campaigns, especially if resources can be combined through partnership working.



### Cultural working group

Chichester City and the surrounding area have a strong cultural offer that is often under sold as part of the general destination message. Cultural events, time-limited performances and exhibitions are perfect for a 'visit now' message creating a sense of urgency to visit a destination and incorporate a cultural experience.

Working group benefits:

- Creation of a clash diary to schedule events and promotions
- Creation of quality content for the Visit Chichester digital channels
- Sharing best practice
- Sharing ticketing and customer profiling data
- Working collectively to develop a wider cultural season beyond the Chichester festival
- Combining product to entice the visitor to stay longer
  - Coffee Culture (catch up with friends over a coffee and experience a show/or exhibition together).
  - Sophisticated shopping - Retail with a side order of culture
- Explore opportunities to build the District music offer via events (such as the Petworth Music festival) and in-location performances to support the evening economy.

**Potential members:** Festival Theatre, Petworth events, Pallant, lovewhereyoulive.com, West Dean, National Trust, Chichester BID, Cathedral, Chichester Festival, Hotel sector representation.

## 3.5 Example campaigns

**3.5.1 The Season** – As the District is known for headline events such as Goodwood Revival and the Chichester Festival there is the opportunity to use these events to position a wider 'Season'... This would deliver an events-based reason to visit from early May – Late October.

Social media and online focused, targeting the London Market or one hour drive time – using the event as the reason to travel now and then build reasons to stay to get the most out the visit.

**3.5.2 Reconnect and down time** – Away from the event-based messaging, the District offer is based around the historical, cultural and natural beauty of the district - there is an opportunity to capitalise on this consumer need to reconnect with friends and loved ones in a digital age.

There is a great opportunity to focus on fun/educational experiences for families, getting out into the countryside, working to promote the wider appeal of the Manhood Peninsula and the South Downs National Park. This type of campaign can be used effectively during peak period to redirect visitors to less well known locations and also to position a reason to visit out of core season. Built around the concept of personal reasons to do something different - a birthday, anniversary, exam reward etc. positioning the District as a great area to spend time together and reconnect around a specific date.

**3.5.3 Food, Drink- Quality** – The Food & Drink message has been under sold in recent years and needs to be promoted as a bedrock component to any short break message. The appeal is the back story surrounding the food and drink production and uniqueness to the region e.g. Selsey Crab. This is a promotional theme that needs to run through all activity but research shows current consumer awareness of the quality of the product is low. Quality and value of the product needs to underpin this product message.

### 3.6 Celebrating areas within the District

Chichester District has a wealth of product that appeals to both the domestic and international visitor. The new Destination Brand needs to celebrate these strengths, by using them as hooks to engage the consumer to then widen their understanding of the complete District experience. An alignment of objectives also offers the opportunity to deliver more through economies of scale.

The table below highlights the Vision aspirations, strengths and opportunities around specific areas.

Area	Vision	The challenge & opportunity
<b>Chichester</b>	The city vision aspires: to welcome more people to the city; better serve all demographics; ensure Chichester is open for business, delivering a vibrant retail offer and utilising the city's heritage and culture.	As the county city, Chichester is well placed to promote a quality retail, heritage and cultural experience supporting both the day and evening economy. To achieve this, the city is reliant on the growth of overnight stays. <ul style="list-style-type: none"> <li>• There needs to establish a clear reason to visit now e.g. cultural event and why to repeat out of season e.g. Christmas</li> <li>• Positioning the city as a touring hub through tailored itineraries which are focused on key segments.</li> <li>• celebrating hidden gems e.g. the canal</li> </ul>
<b>Midhurst</b>	(Draft): the 2018 Vision appraisal highlights the aim to increase visitor traffic and duration of stay.	Duration of stay beyond 2-3 hours. Visitors often miss whole sections of the High Street and are unaware just how easy it is to combine a visit to the Cowdray ruins, secret gardens and farm shops with the independent retailers and quality accommodation, and great food & drink offered in the town. <ul style="list-style-type: none"> <li>• In addition to the core product a series of low-profile polo events enable visitors to experience the sport on a £5 gate ticket. This call to action is already used by local Airbnb hosts as a 'best kept secret' insider tip.</li> </ul> The £5 tickets offer a unique experience, providing a reason to visit now.

<b>Petworth</b>	The town Vision sets out to create a sense of place, support a vibrant retail economy and deliver coordinated town management.	<p>Like other market towns, Petworth faces a changing retail environment, however its USP of 30 antiques, art and interiors shops, quality dining and accommodation, positions it well to the international market for independent and small groups.</p> <ul style="list-style-type: none"> <li>• Petworth has the opportunity to combine Petworth house/ Cowdray and Midhurst / and vineyard tours to create a full day / overnight stay.</li> <li>• Capitalise British nostalgia when Downton releases autumn 2019.</li> </ul>
<b>Selsey / STOMP</b>	(currently in consultation): the 2018 Vision appraisal highlights the aim to increase visitor traffic and duration of stay and position Selsey as a year-round destination.	<p>Issues over seasonality and the effect on local businesses/ employment/ infrastructure/ are the primary issues. Environmental management with both the AONB and RSPB reserves.</p> <p>Access to beaches/wildlife and quality seafood</p> <ul style="list-style-type: none"> <li>• Working in partnership with Bunn Leisure to not only target current visitors but also to engage new customers for short breaks out of core season.</li> <li>• Position Selsey as a touring hub for the West Sussex Coast and beyond.</li> </ul> <p>In addition, consideration needs to be given to the STOMP project findings - Jan 2018.</p>
<b>South Downs National Park</b>	<p>The National Park Vision is to conserve and enhance the distinctive area where people live, work, farm and relax.</p> <p>Using the landscape to enhance lives, support the local economy, and engage visitors to stay longer.</p>	<p>Although not a sunshine dependent destination, SNDP is considerably affected by the seasons.</p> <p>By celebrating the uniqueness of the landscape and the market towns, the SDNP could be a lead partner in a 'get outdoors' style campaign targeting London families and couples;</p> <ul style="list-style-type: none"> <li>• Hiking and Biking</li> <li>• Green footprints</li> <li>• Local produce and quality food &amp; drink offer</li> <li>• Extreme Sports</li> </ul>

## 4. Making it Happen

### 4.1 Regional joint working framework

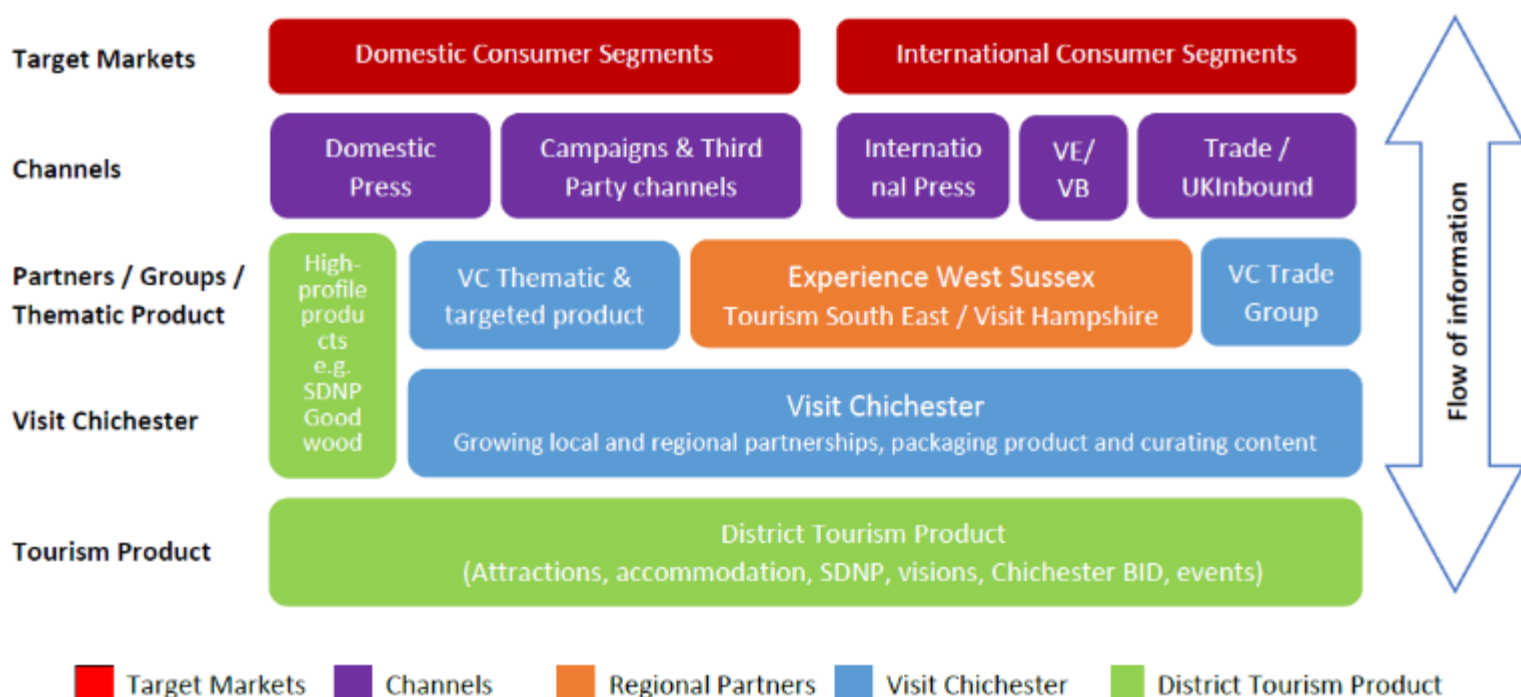
Destination Management Organisations (DMOs) are responsible for **leading, influencing and coordinating** the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment. Destination management includes the **planning, development and marketing** of a destination.

Through the consultation process it became clear that there is a very specific and important role for the district DMO to play as the visitor economy champion for Chichester district, ensuring that the destination messages are coordinated and visible in a busy marketplace. Stakeholder engagement sits at the heart of this role, with Visit Chichester being both the conduit for District content to be packaged and shared through the relevant channels, but also acting as the channel to disseminate industry insights and expertise locally.

In order to maximise the resource available, it's essential that a clear **joint working framework** is in place to **avoid duplication**. This framework will ensure that there are clear channels of communication with specific roles for the county and district DMO. It also recognises and utilises the strong consumer brands and trade relationships that individual partners such as South Downs National Park and Goodwood hold in their own right.

Visitors don't see administrative boundaries but understand destinations by recognisable and logical regions defined by geography or product. Therefore, Chichester should see neighbouring destinations such as Arundel and Hampshire as partners and rather than competitors.

**Figure 4.1.1** The following diagram shows the suggested regional joint working framework and demonstrates the flow of content from District tourism product to target consumers and also the flow of information from delivery channels and industry partners back to the District tourism industry.



An example of this would be District tourism businesses providing information to Visit Chichester who collate content for the travel trade which is then distributed to travel trade contacts via the Visit Chichester Trade Working Group and/or Experience West Sussex. The travel trade then promote this on their channels to international target markets. When opportunities or requests come from the travel trade to the Visit Chichester Travel Trade Working Group or Experience West Sussex, Visit Chichester would coordinate this within the District.

## 4.2 The role of Experience West Sussex

Experience West Sussex is jointly funded by West Sussex District Councils through pooled business rates which include contributions from Chichester District Council. In order to avoid duplication and ensure best value for Chichester District Council, Experience West Sussex and Visit Chichester must have **clearly defined roles**. Agreed deliverables could be supported through a service level agreement.

Experience West Sussex is best placed to develop a regional product, manage national and international relationships, while feeding opportunities and information to the industry via Visit Chichester who hold the relationships with tourism stakeholders locally. It would also be logical for core research to sit at a county level to ensure that data is comparable.

The strong local networks and content developed through Visit Chichester will put the district in a position to maximise the benefits of the initiatives delivered through Experience West Sussex.

## 4.3 Working with the travel trade

It is important to develop a consistent relationship with the travel trade. There are two key areas that offer opportunities for Chichester District, taking advantage of the relatively close proximity to central London.

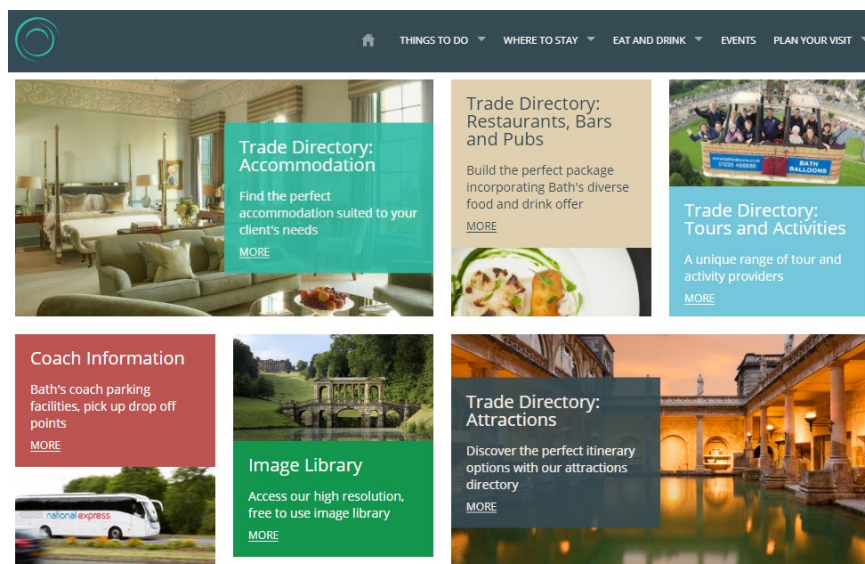
- **Ground handlers/ Group organisers:** These are often UK based coach tours who promote excursion packages either to travel agents or to the visitor direct. Packages tend to be 2-3 attraction experiences; a combination of city visit and rural based heritage property (Chichester & Petworth); or directly related to a destination event (Festival of Speed).
- **Specialist Agent:** Small exclusive tours (small groups/families/individuals), often focused on the overseas market. These agents are looking for unique experiences, off the beaten track product and deliver a considerably higher spend per head from their clients. Organisations such as Virtuoso, a global network of luxury travel agents who design bespoke and memorable experiences for their clients. The most effective way to reach these agents is working in partnership with the VisitBritain US travel trade team who already have established relationships.

The trade require specific information and often look to the DMO to produce either a trade guide or core information pack that will enable them to develop and package attractions, restaurants and experiences in the district. How they are managed and received at point of entry is vital to generating and retaining group business.

### 4.3.1 Travel Trade Case Study: Visit Bath

Bath is continually referenced as one of the leading UK destination for excellence in travel trade provision - The destination website carries a full range of trade specific information and offers language versions.





The City DMO recognises the value of the travel trade as product development partners and specifically as a way to raise the profile of Bath as a destination direct to the international consumer. The Visit Bath website has extensive information on:

- Attractions suited for group visits and specific group itineraries
- Aligned events that are suitable for group visits
- Targeted information for cultural events and performances
- Shopping
- DMO managed events such as the Christmas Market

## Travel Trade Working Group

As Visit Chichester's trade engagement has been markedly reduced over the past few years, many trade buyers deal direct with district attractions. Therefore developing a joint trade strategy with key partners will help the DMO define their role and ensure they add value to current trade engagement.

### Working Group Benefits:

- Coordinated trade familiarisation trips to the region with Experience West Sussex, working with VisitBritain and/or UKInbound.
- Coordination of district trade info for sales calls and information requests
- Developing a District travel trade guide
- Engaging in specific benchmarking activity, monitoring use of the coach park and International /domestic group visits to attractions.
- Working with CDC and Chichester Bid to create an engaging and welcoming point of entry and improving the city's coach park facilities

**Potential members:** National Trust, Chichester cathedral, Fishbourne and Goodwood, Chichester Bid, representation from the accommodation sector.

## 4.4 Working with third parties / Extend the destination message:

With limited resource it is crucial that the DMO works with all third-party organisations that share a role in influencing the visitor's destination choice and deliver information to take them to final booking.

- Working with public sector organisations such as VisitBritain provides an instant route to market for DMO's, providing ready-made marketing platforms and a vetted contact database.
- Equally, partnering with private sector transport providers and booking platforms deliver direct contact with the consumer, where it is in the partners interest to add value to ensure a final transaction.

#### 4.4.1 Priority Third Party Partners

The following table highlights the key third party partners for the District, who can deliver a direct route to market or to the visitor.

<b>Organisation</b> Public & Private sector organisation	<b>Benefit</b> Examples of key delivery opportunities
<b>VisitBritain- International &amp;VisitEngland - Domestic</b>	<b>Reaching the International visitor and putting Chichester on a National platform - Activity:</b> <ul style="list-style-type: none"> <li>• Market Insights/Access to travel trade/ PR, Blogger, Influencer network/training/funding/consumer facing platforms to promote destination/ campaigns.</li> <li>• Opportunity to work with EWS on both trade and PR engagement/ potential for engagement with VB luxury campaign and promotional activity around new film releases e.g. Downton.</li> </ul>
<b>Targeted Press and PR</b>	<b>Working with local and national media to reach local residents and domestic market - Activity:</b> <ul style="list-style-type: none"> <li>• Raising the profile of events and promotions via local/national media.</li> <li>• Working directly with stakeholders to deliver joint destination messages and press visits.</li> </ul>
<b>Transport Partners</b>	<b>Reaching the Domestic 2-hour journey time audience - Activity:</b> <ul style="list-style-type: none"> <li>• Opportunity to work with Southern &amp; Stagecoach to provide destination travel incentives and messages.</li> <li>• Working in partnership to deliver an engaging Destination Brand - targeted campaigns e.g. '2 for 1' on attractions with Visit Chichester as a key co-ordinator. Potential for shoulder season rail campaigns targeting London / commuters.</li> </ul>
<b>Experience West Sussex</b>	<b>Extending the District message - Activity:</b> <ul style="list-style-type: none"> <li>• Working together to deliver continuity of message for the District and County.</li> <li>• Establishing clear roles to avoid duplication.</li> <li>• Economies of scale for economic insights and research programme.</li> <li>• Training opportunities and sector engagement.</li> </ul>
<b>District tourism businesses</b>	<b>Extending the District message - Activity:</b> <ul style="list-style-type: none"> <li>• Working together to share insights and best practice.</li> <li>• Sharing key tools for the district brand development.</li> <li>• Championing the wider District offer by delivering campaigns/PR/ Trade and Direct consumer information delivery.</li> </ul>
<b>Trip advisor/ Booking.com/ Expedia/ Airbnb</b>	<b>Capitalising on third party platforms to carry key information about the District to support final booking decision - Activity:</b> <ul style="list-style-type: none"> <li>• Working with these organisations to disseminate training information and insights.</li> <li>• Working directly with Airbnb superhosts to become destination ambassadors.</li> </ul>

## 4.5 Stakeholder engagement and delivering value

For Visit Chichester to gain buy-in from the private sector, both financially and in terms of engagement, it must ensure that it delivers real value for partners. This can be achieved by facilitating an industry network and sector specific support, which isn't currently available to businesses and delivering joined up marketing activity, that meets a need for both businesses and the consumer.

**4.5.1 Building a network** – The stakeholder workshops demonstrated that one easy way for Visit Chichester to add value for partners, is to build an active network and facilitate opportunities for peer to peer knowledge exchange and collaboration. The Steering Group for the DMP may become a Tourism Advisory Board (TAB) providing cross-region insight into objectives, initiatives, and metrics of performance. This forum will also act as a platform to engage partners in Visit Chichester activities and share industry updates.

**4.5.2 Voice of the industry** – As the local visitor economy champion, Visit Chichester would act as the voice of the industry. This would involve lobbying on issues that may impact the sector at a local and national level, as well as ensuring that the economic and social benefits of the visitor economy are communicated and recognised locally.

**4.5.3 Sector specific business support** – By providing access to sector specific business advice and delivering a training programme, Visit Chichester can fulfil the need of many tourism SMEs and volunteer run organisations which form an important part of the visitor economy in the district. Valuable information can be disseminated from national level sources and local service providers are often willing to run workshops with businesses in order to raise their profile.

**4.5.4 Consistent destination message** – Acting as the guardian for a strong destination brand, delivering coordinated messages and strong thematic content both on Visit Chichester channels and through third parties will provide real demonstrable value to partners. **Tools for partners** such as content calendars, image libraries, sample content and itineraries will make it easy for partners to integrate these messages on their own channels too.

**4.5.6 Partnership marketing** – In order to deliver real value for partners through **joint marketing activity**, Visit Chichester will need to demonstrate how it delivers something businesses couldn't achieve on their own and how economies of scale can deliver better value and reach wider audiences. By focussing on the best prospect audiences, key messages and product fit identified earlier, it will ensure that the activity is addressing a need of both the business (e.g. delivering visitors outside of peak times) and delivering what the consumer is looking for. Market specific partnership activity such as meetings and incentives could also be developed based on demand from partners.

**4.5.7 Stakeholder communications** – In order to engage businesses in these activities and to demonstrate the value of this work it is necessary to deliver a regular programme of stakeholder email communications. This should include contacts at all levels and smaller businesses as well as key accounts.

**4.5.8 Key account management** - A programme of key account management and stakeholder satisfaction surveys will ensure that there is an in depth understanding of partners' needs and that the organisation is well placed to respond to changes in the market.

**To achieve these objectives, Visit Chichester will need to allocate sufficient resource to key account management and stakeholder engagement.**

## 4.6 Potential revenue generation models

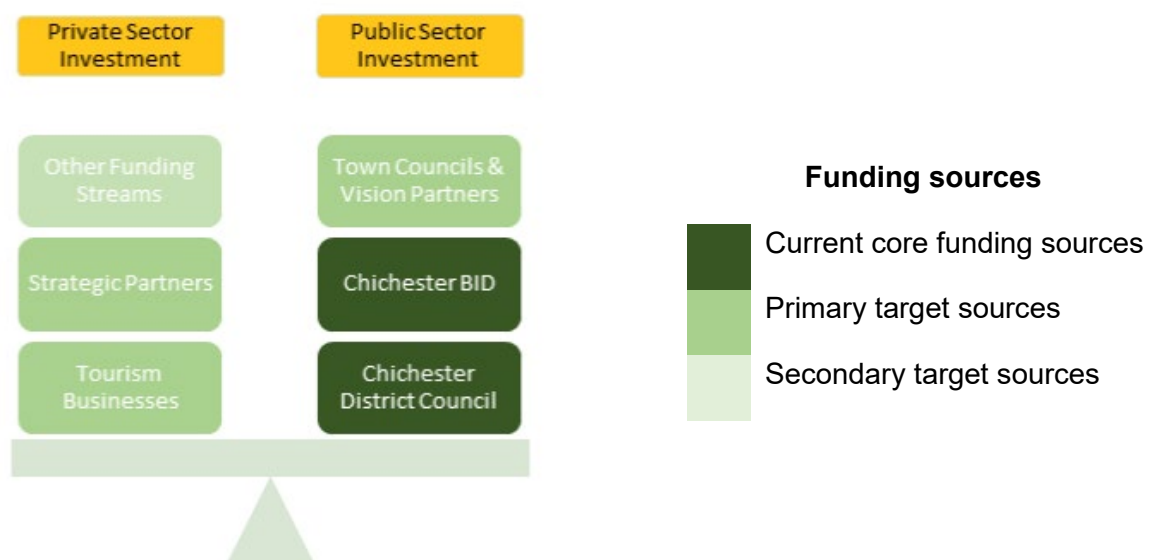
Visit Chichester will need to deliver a sustainable business model and demonstrate a return on investment for core funders (Chichester District Council and Chichester Business Improvement District) by leveraging additional income from other sources.

### 4.6.1 The balance between the public and private sector

There are currently no examples of official Destination Management Organisations (DMOs) in the UK that exist without any public funding but balancing this with private sector investment and strategic input is crucial to the success of a destination. There are membership organisations and agencies delivering destination marketing without public funding but in these cases the interests of the organisation are likely to be skewed towards the aims of larger funding organisations and away from achieving wider economic benefits and effectively managing the destination.

Effective DMOs of a similar scale operate on an annual overall budget in the region of £150,000 - £300,000. The Visit Herts case study below demonstrates how an effective partnership model can quickly leverage additional funding.

**Figure 4.6.1.1** There are several channels through which DMOs generate the additional funding to balance public sector funding. A sustainable business model should be built around a combination of these sources as demonstrated in the diagram below.



**4.6.2 Annual membership model**– The most common way for DMOs to leverage additional funding is via an annual membership scheme, whereby a package of benefits that relate to DMO delivery (marketing, PR, trade, business support, networking etc.) is offered in return for an annual fee. Rates can be set on a sliding scale based on number of visitors, turnover or staff numbers or in tiered packages with increasing benefits. It's important to balance the needs of the visitor with revenue generation, so there should be some free presence for businesses and events that don't contribute financially to ensure that content is dictated by the visitor rather than financial contribution.

In the case of Visit Chichester, this could be a joint membership with joint deliverables across Visit Chichester and Experience West Sussex to avoid duplication and reinforce the joined-up approach.

**4.6.3 Service level agreements**– For destination partners in particular, service level agreements (SLA) can be an effective way to ensure that financial contributions to a DMO provide deliverables that are aligned with wider objectives and KPIs (performance metrics and timelines). This could be a solution for gaining buy-in from Vision partners, town councils or BIDs and for ensuring that smaller businesses in these areas that are unable to contribute financially are represented.

**4.6.4 Buy-in activity**–These are often ‘menus of opportunities’ that can be bought in addition to core membership. This could be a contribution to feature in partnership marketing, targeted consumer campaigns, trade activity, an enhanced digital presence or tickets to attend a conference/event organised by the DMO. The opportunity must demonstrate how contributions from multiple partners will provide a wider reach and stronger consumer proposition than an individual business could achieve with the same investment on their own.

**4.6.5 Other strategic partners**– There is potential in Chichester to lever additional support by identifying shared objectives with other strategic partners. Transport providers such as Southern Rail have a vested interest in encouraging off peak visits to destinations in their network and may be able to provide in-kind support on their channels as well as financial investment.

Large local organisations such as Rolls Royce may be interested in the quality of life benefits for their staff that a strong tourism offer brings to a region and developers may want to invest in providing a vibrant destination to attract buyers.

There is also an opportunity to provide value for the University of Chichester by engaging their student population as destination ambassadors and providing them with strong destination messages to attract students to study with them.

**4.6.6 Funding applications**–There are many opportunities for destinations to leverage external funding for specific projects through schemes such as VisitEngland’s Discover England Fund, Arts Council England, Coastal Communities Fund and Heritage Lottery Fund. An audit of available opportunities would need to be conducted and assessed in line with wider objectives and match funding requirements before developing a full application. This could be undertaken with wider county or regional partners.

#### **4.6.7 Case Study: Visit Herts funding growth**

Since launching less than three years ago, Visit Herts has doubled the core annual investment received from Hertfordshire County Council and the Hertfordshire LEP allowing Visit Herts to deliver increased activity for partners. This was achieved through a combination of sources:

- Buy-in from additional public and private sector stakeholders
- Leveraging additional ROI by using core funding to match fund national projects such as VisitEngland’s Discover England Fund

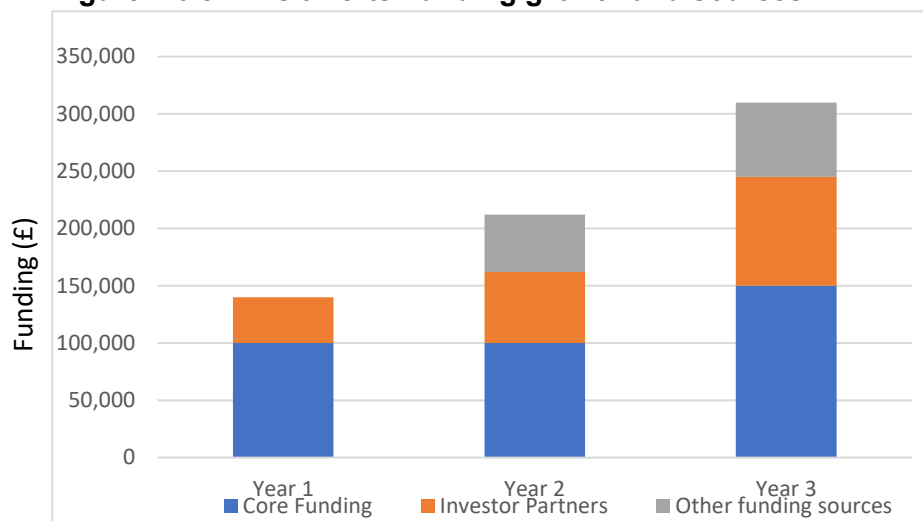
This strong private sector support has been delivered through a partnership structure formed of:

- Co-chairs from leading visitor attractions
- A Partnership Group made up of decision makers from the public and private sectors
- 50 public and private sector investor partners and over 800 wider stakeholders

***By adopting a similar model, Visit Chichester has the opportunity to grow private sector engagement and financial investment through strong private sector leadership.***



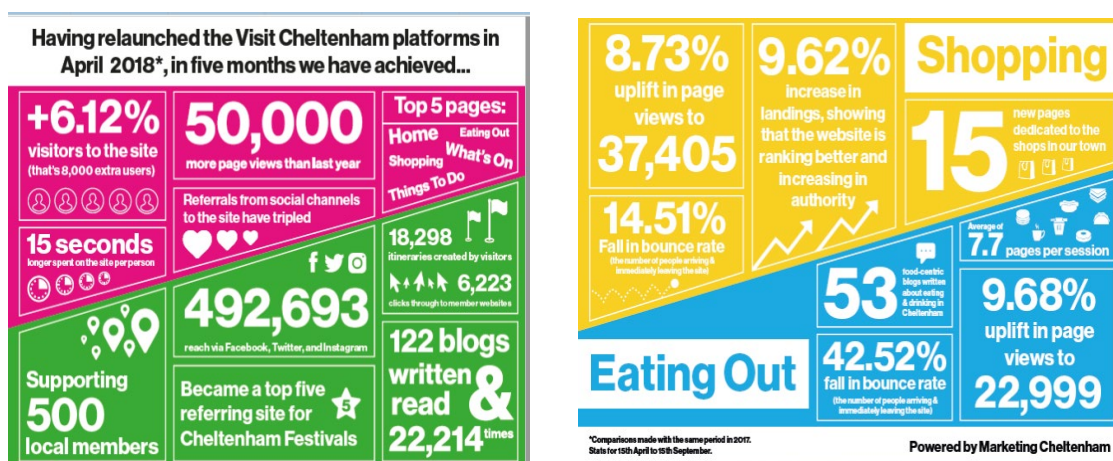
**Figure 4.6.8.1 Visit Herts Funding growth and sources**



#### 4.6.8 Case Study: Visit Cheltenham stakeholder management & communications

Visit Cheltenham receives core funding from Cheltenham District Council and Cheltenham BID. Since implementing a new visitor economy strategy in 2017 they have:

- Developed clear fees and benefits for partners
- Implemented a joint working framework with Visit Cotswolds
- Delivered and communicated clear value for partners



***It will be essential for Visit Chichester to develop a simple fee and benefit structure as well as clearly demonstrating the return on investment to partners.***

#### 4.6.9 Recommendations for Visit Chichester

Currently the only additional revenue generated by Visit Chichester is advertising revenue to fund the Visit Chichester printed guide but this financial contribution has not been a part of a long-term partnership or linked to wider benefits. The two case study examples demonstrate how significant revenue can be generated through a partnership package in a relatively short timeframe. Both also focus on delivering a clear ROI by primarily targeting consumers through digital channels.

**To achieve long-term buy-in from the private sector and a sustainable business model, Visit Chichester will need to:**

- demonstrate the ability to deliver valuable activity
- develop clear packages and benefits
- develop a structure where leading private sector partners are involved in strategy
- build a network and relationships with stakeholders

## 5. Developing the action plan

### 5.1 Working together to deliver the best results

A successful Destination Management Plan is reliant on shared ownership. As with many other destinations, aspects such as event delivery, destination publications and the consumer facing website do not necessarily sit in the same place. It is therefore vital to establish a clear working structure right from the start; allocating budget, delivery responsibility and agreeing key milestones.

Tourism Advisory Board			
Visit Chichester			
Workstream 1	Workstream 2	Workstream 3	Workstream 4
1. Stakeholder engagement	2. Placemaking, Identity and product	3. Targeted consumer engagement	4. Amplifying the message
<ul style="list-style-type: none"><li>• Key Account Management</li><li>• Stakeholder Communication</li><li>• Building a network</li><li>• Voice of the Industry</li><li>• Business Support</li><li>• Revenue Generation</li></ul>	<ul style="list-style-type: none"><li>• Destination Brand review</li><li>• Developing the product</li><li>• Content Audit</li><li>• Shared tools</li><li>• Improving facilities</li><li>• Waymarking</li></ul>	<ul style="list-style-type: none"><li>• Joint marketing plan</li><li>• Targeted content</li><li>• Targeted campaign delivery</li><li>• Local ambassadors</li><li>• Resident engagement</li></ul>	<ul style="list-style-type: none"><li>• PR programme</li><li>• Travel trade</li><li>• Third party platform</li><li>• 3rd party partnerships</li></ul>

The above column headings represent the key work streams covered in the following action plan, where each of the bullet pointed sub headings are broken down into measurable tasks.

### 5.2 Measurement and reporting

Establishing clear metrics by which to measure growth in the visitor economy is vital. At present, both county and District data originate from 2015, with the opportunity to capitalise on the latest available figures for 2017. This would enable the District to have two consecutive sets of benchmark data. Economies of scale exist if this economic impact study is adopted by Experience West Sussex and other West Sussex districts.

In addition, this District level data can be aligned to other performance indicators such as digital reach, engagement and subscribers, PR reach and coverage, additional spend from marketing campaign evaluation. Other indicators of success could include growth in engaged partners for the DMO, city footfall counters, day visitor dwell time based on car park ticketing and increased use of coach parking facilities.

### 5.3 Resource and funding

The following Action Plan is based on a partnership delivery structure. It is possible to deliver core activity allocated to Visit Chichester within the current budget with additional activity funded through private sector investment however there may be some initial upfront investment needed to put the necessary foundations and systems in place.

The priority should be to deliver stakeholder management within the permanent Visit Chichester team. Based on current staffing our recommendation would be to use a third-party supplier to deliver the majority of the marketing activity for the first two years before assessing if the core marketing delivery can be brought in house by increasing staff.