

# VisitChichester

  
visitchichester



## Enhancing Excellence

**Destination Management Plan for  
Chichester and District**

**2010-2015**

# Introduction

No one in business plans to fail – some fail to plan. From the outset the Board of Visit Chichester was determined to plan for the future prosperity of our destination and as a result the profitability and sustainability of those businesses that make up the tourism industry. We are also grateful to Chichester District Council for their support and adoption of the Plan.

This Destination Management Plan is designed to capitalise on the strengths and develop the weaknesses of the destination and concentrates on three key areas or Enhancement Themes:

- The Visitor Experience is about the areas our customers engage with, and includes customer service, quality management and research
- Destination Marketing, expresses the wishes in respect of recruiting new customers and retaining existing ones
- Industry Competitiveness deals explicitly with requirements for business support and advice, as well as developing a sustainable tourism industry

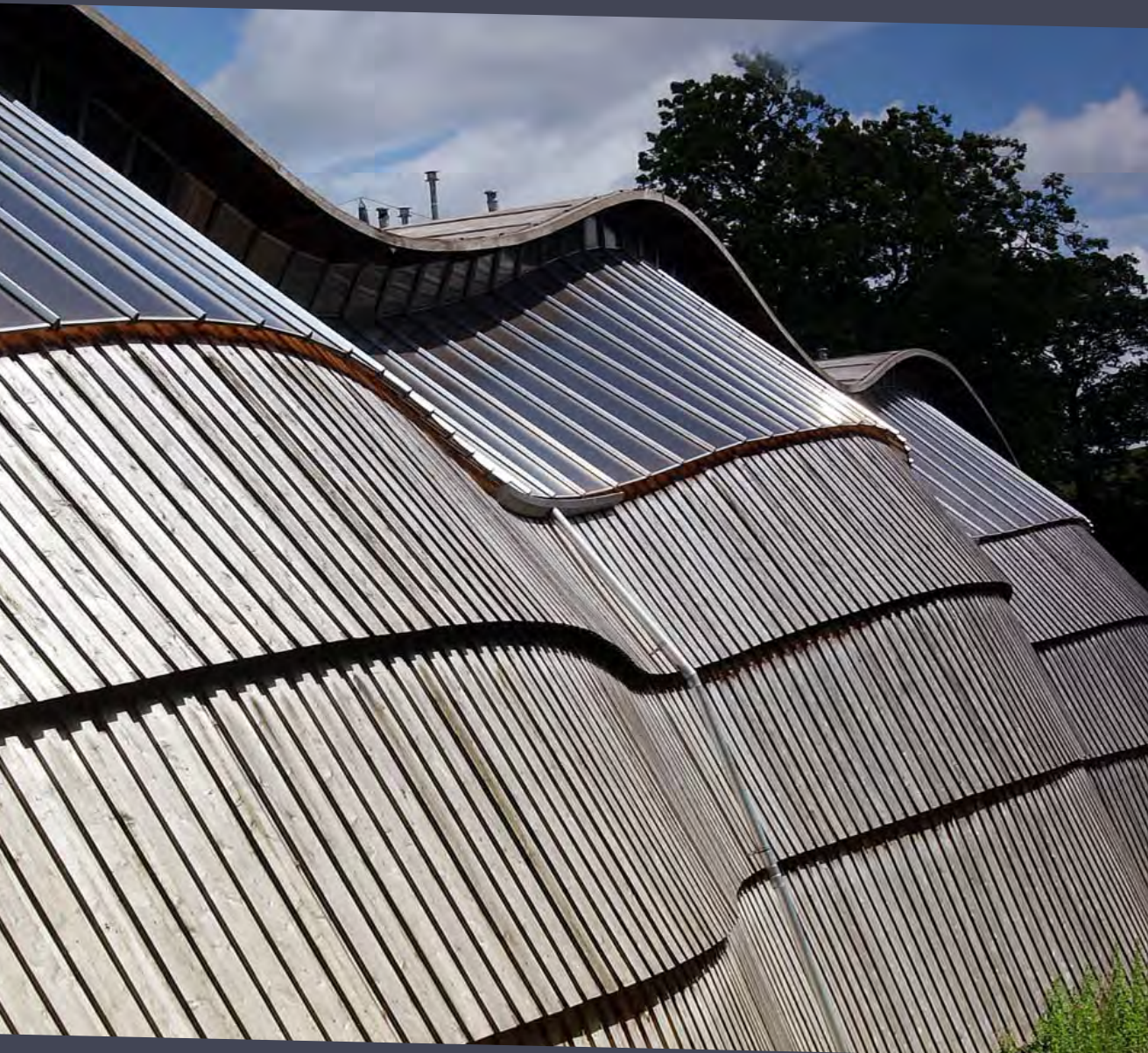
I do hope you will keep a copy near to hand and make a point of supporting the excellent elements of this important Plan.

**Antony Wallace**  
Chair Visit Chichester





# Introduction





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# Contents

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*“To grow the value of the District's core tourism assets via greater engagement and partnership, through which Chichester District will secure an unrivalled reputation for its high-quality landscape, accommodation, attractions, public realm, heritage, arts and cultural offer, excellent customer care, and a year-round programme of activities and events centred on the area's unique culture and natural environment”*

## The Destination Management Plan

The aim of the Destination Management Plan is to deliver the key aims and objectives outlined by Visit Chichester. Specifically:

- To provide an environment in which the tourism industry can flourish
- To provide the conditions to deliver a world class visitor experience
- To take a share in sustaining the special qualities that makes Chichester District a unique world class destination
- To develop new opportunities for market and product development in the City and the rural and protected landscapes in the District
- To act as a catalyst to stimulate the development of existing and new businesses
- To ensure that Chichester District's environmental integrity is maintained and enhanced
- To contribute to sustaining and enhancing local communities



## Targets

- Increase visitor spend from £300m (2008) to £410m in real terms by 2015
- Increase the annual volume of trips (particularly out of high season) from 5.10m (2008) to 6.1 m by 2015
- Increase in tourism supported jobs from 8,470 (6,094 FTE) to 8,900 (6,500 FTE) by 2015 (as measured by the Cambridge Economic Model)
- Increase bed occupancy levels for serviced accommodation from 48% to 55% by 2014 as reported in 2015
- Commensurate increase for other accommodation sectors (baseline data available)
- To increase the number of accommodation providers trading with the Destination Management Partnership with VCAS to 48% by 2015



# The National Picture

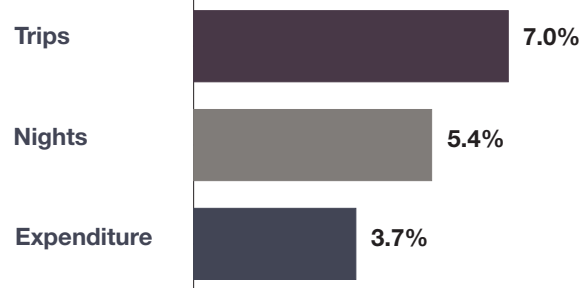
## The Value of Tourism

- In 2009, tourism was worth £115.4bn to the UK economy equivalent to 8.8% of UK GDP
- In 2009, tourism employed 2.64 million people; equivalent to 8.5% of workforce

## Domestic Tourism

- In 2009, UK residents took:
  - 60.7 million holidays of one night or more, spending £12.6 billion
  - 18 million overnight business trips, spending £4.3 billion
  - 44.4 million overnight trips to friends and relatives spending £4.5 billion
- Overall, the number of domestic trips taken in 2009 was 7% higher than in 2008, while total spending increased by 4%
- Bednights also rose by 5% in the UK and 6% in England
- 53% of GB adults took a short break in England
- 33% of GB adults took a holiday in England

Domestic Overnight Tourism in England - 2008 v 2009



[Source: Visit Britain, 2010]

## Inbound and Outbound Tourism

- 30 million overseas visitors in 2009, spending £16.5bn
- Visitor numbers in 2009 were 7% lower than in 2008, although there was a small 1% increase in visitor spending
- The UK is ranked 11th out of 133 in the competitive ranking of the global tourism market
- In 2009, UK residents made 15% fewer trips abroad than in 2008, while spend was down by 13%



# The National Picture

## Tourism Trends

- In 2009, the number of trips grew by 7% overall
- This increase was been driven by strong growth in 'pure holiday' trips during the year - up by 17% in the UK and 18% in England
- The increase in 'pure holidays' has come from both longer and shorter breaks, with 1-3 and 4+ nights up by 18% and 16% respectively in the UK
- Expenditure on 1-3 and 4+ nights has increased by 5.5% and 16.4% in the UK respectively, and by 4.3% and 22.% respectively in England
- In 2009, business trips were slightly down compared with 2008 (-1% in the UK and England), with expenditure falling by -3% in the UK and -2% in England
- The number of VFR trips to friends and family increased only marginally - 1% in the UK and 2% in England
- Short holiday breaks (1-3 nights) make up 63% of trips and just over half of holiday spend –higher spend per night than longer trips
- Short breaks are most likely to be taken by consumers without kids, while those with kids make up the greatest share of longer holidays

Tourism Trips Taken in the UK 2008-2009

	2008 (Jan-Dec)	2009 (Jan-Dec)	%Change
Trips (Millions)	117.7	126.6	7%
Nights (Millions)	378.3	398.7	5.4%
Spending (£Millions)	21,707	21,881	3.7%
Av. Nights per Trip	3.21	--	--
Av. Spend per Trip	£179	--	--
Av. Spend per Night	£56	--	--

[Source: Visit England, 2010]

%Change in UK Domestic Trips, Nights & Spend 2008-2009

	Trips %Change	Nights %Change	Spend %Change
Total	7%	5.4%	3.7%
Holiday (Millions)	11.8%	11.8%	7.8%
- 1-3 nights	17.5%	16.2%	5.5%
- 4+ nights	15.5%	14.7%	16.4%
VFR (Millions)	8%	-2.0%	-5.1%
Business/work	-1.4%	-1.6%	-3.3%

[Source: Visit England, 2010]

# Sustainable Tourism

## A Sustainable Perspective

Sustainability is central to the Destination Management Plan for Chichester. The **VICE** model identifies sustainable destination management as the equitable interaction between **Visitors**, the **Industry** that serves them, the **Community** that hosts them and their collective impact on, and response to the **Environment** they are in.

The aim of the DMP is to articulate local VICE circumstances and, through partnership with the local tourism industry, create a strategy which aims to:

- Welcome, involve and satisfy Visitors
- Achieve a profitable, prosperous and high-quality Industry
- Engage and benefit all host Communities
- Protect, reflect and enhance the local Environment

The VICE concept is extremely simple and can be used by agencies, businesses and government as a means of making tourism an integral part of sustainable development, recapturing a sense of local community control, resilience, financial independence and pride that will improve both the local quality of life and the visitor experience.

### The VICE Model



# Place Making Charter

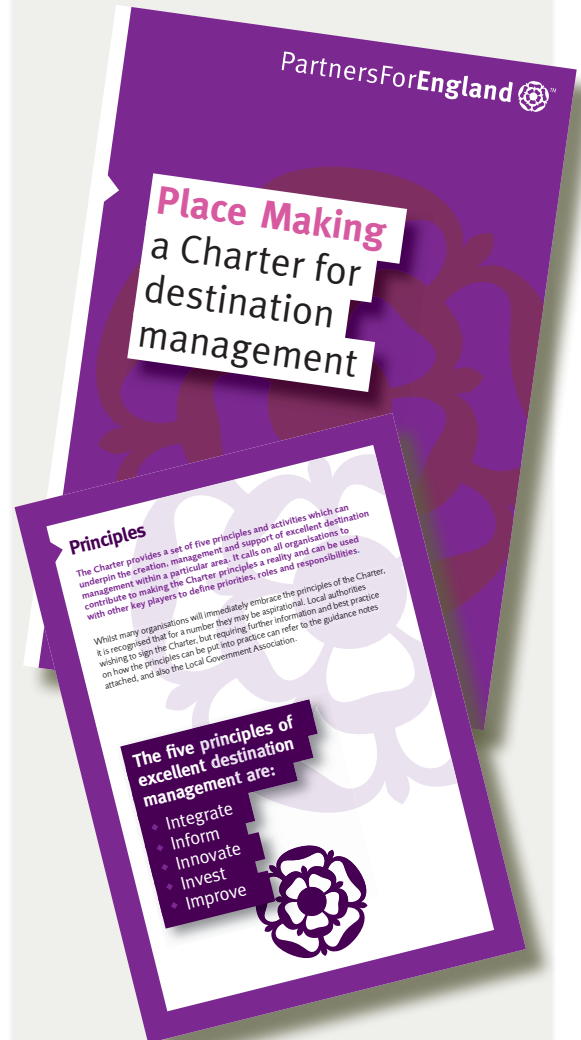
## Place Making Charter

The Destination Management Plan also reflects Visit Chichester's commitment to the Place Making Charter, which has been developed to help realise the economic, environmental and social benefits of a thriving visitor economy where a focus on destination management and development is essential.

The Charter promotes continuous quality improvement and provides a core set of principles (integrate; inform; innovate; invest and improve) to be championed by stakeholders in a destination - recognising that places are unique.

The specific aims of "Place Making – a Charter for Destination Management" as identified by Partners for England (2010) are to encourage:

- **Awareness** – to influence prioritisation by national and regional bodies, local authorities and businesses
- **Clarity** – roles and responsibilities of key players
- **Focus** – on destination management and place-shaping
- **Partnership** – encourage and foster collaboration in a fragmented sector
- **Improvement** - drive continuous quality improvement





# The Strategy Jigsaw

## The National Scene

The Destination Management Plan draws on the review of Tourism being undertaken by EnjoyEngland, and reflects key themes outlined in 'Realising the Opportunity for Tourism - A Strategy for English Tourism'.

The key objectives in this strategy are:

- To increase England's share of global visitor markets
- To offer visitors compelling destinations of distinction
- To champion a successful, thriving tourism industry
- To facilitate greater engagement between the visitor and the experience



### Vision

**“To maximise tourism’s contribution to the economy, employment and quality of life in England”**

# The Strategy Jigsaw

## The Local Scene

The Destination Management Plan is designed to integrate with the existing policy framework adopted by Chichester District Council and has been developed in consultation with key stakeholders across the District.

### Key Priorities

- The Economy
- Environment
- Health and Wellbeing
- Housing and Neighbourhoods
- Transport and Access

**'To make Chichester District a vibrant and prosperous economy'**

### Key Objectives

- Provide a highly regarded business support environment
- Create a qualified and highly skilled workforce
- Assist businesses to be more sustainable
- Develop the rural economy to improve access to services for all
- To regenerate the District including its City and Rural Towns



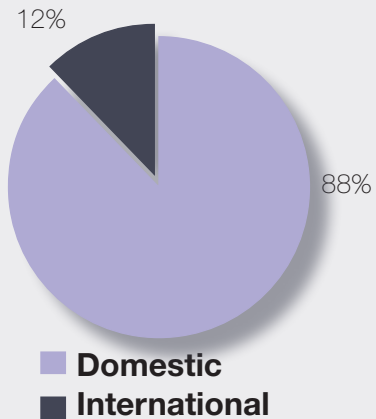
# Tourism in the Chichester District

Tourism is an integral part of the District's economy. The 2008 economic impact assessment for Chichester District revealed:

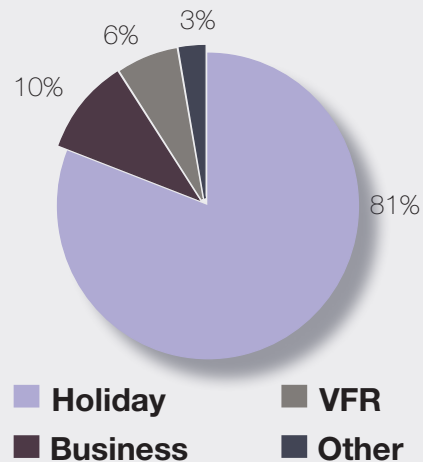
- 1637,310 trips by staying visitors
- Total tourism value to the local economy £384m
- 2.1m staying visitor nights
- £135.9m spent by staying visitors
- 5.10m tourism day trip visitors, generating £164.75m expenditure
- 8,470 actual jobs supported
- 45.7% of staying or overnight visits to Chichester were accommodated in serviced accommodation, 26% in non-serviced accommodation, and 19% in homes of friends and family



## Staying Trips 2008



## Purpose of Trip 2008





# Visitor Profiles

## Visitor Profiles

An understanding of the visitor profile is essential to ensure the overall quality of the visitor experience. Research undertaken in Chichester District, drawing on lifestyle-based market segmentation focusing on visitor attitudes, values and perceptions of quality reveals a number of distinctive visitor profiles to the different parts of the District. The key Arkenford segments are **Cosmopolitans**, **High Streets**, **Traditionalists** and **Functionals**.

	<b>High Street</b>	<b>Traditionalists</b>	<b>Cosmopolitans</b>	<b>Functionals</b>
<b>Chichester City Centre</b>	38%	17%	16%	6%
<b>Selsey</b>	10%	22%	13%	19%
<b>East and West Wittering</b>	17%	17%	22%	19%
<b>Midhurst/Petworth</b>	33%	15%	27%	19%
<b>National</b>	18%	11%	19%	9%

# Visitor Profiles

## Arkenford Segment

### Cosmopolitans

#### Key Characteristics

- Active and independent market with an interest in new products, opportunities and experiences
- Emphasis on individuality rather than fashion
- High spend market that value good service and personalised attention
- Adopters of new technology
- Interested in arts and culture, but also value peace and relaxation

#### Segment Size

- 15.20%

#### Average Age

- 42

#### Age Range

- 15-25

#### Mean Income

- £26,004

#### % Pre Family

- 28

#### % Family

- 34

#### % Post Family

- 38

#### Links to District

- Culture, arts and heritage, appeal of the countryside, independent shopping

### High Streets

- Interested in fashion brands
- Style is more important than functionality or individuality
- Not the first to adopt but are keen to follow when a fashion has been established
- Emphasis on good customer service and traditional values
- Prepared to try new experiences
- Interested in intellectual pursuits, arts and culture

- 21.20%

- 42

- 26-35

- £22,150

- 28

- 32

- 40

- High street shopping

# Visitor Profiles

Arkenford Segment	Traditionals	Functionals
<b>Key Characteristics</b>	<ul style="list-style-type: none"> <li>Main stream market, self reliant and independent</li> <li>Value good customer service and will pay for it; will not spend on expensive alternatives</li> <li>Branding is not a key purchase driver and a greater emphasis on traditional values</li> <li>Emphasis on good customer service and personal attention for which they will pay</li> <li>Enjoy arts and culture</li> </ul>	<ul style="list-style-type: none"> <li>Resistant to spending and self-reliant</li> <li>Price driven with a clear emphasis on functionality over style</li> <li>Traditional values and are not prepared to pay for individuality</li> <li>Service is something they expect as opposed to something that they will pay extra for</li> <li>Interested in new experiences including arts and culture</li> </ul>
<b>Segment Size</b>	12.4%	9.4%
<b>Average Age</b>	56	53
<b>Age Range</b>	56-65	66-75
<b>Mean Income</b>	£20,007	£16,345
<b>% Pre Family</b>	8	6
<b>% Family</b>	20	25
<b>% Post Family</b>	72	29
<b>Links to District</b>	Arts and culture, traditional pubs	Heritage attractions

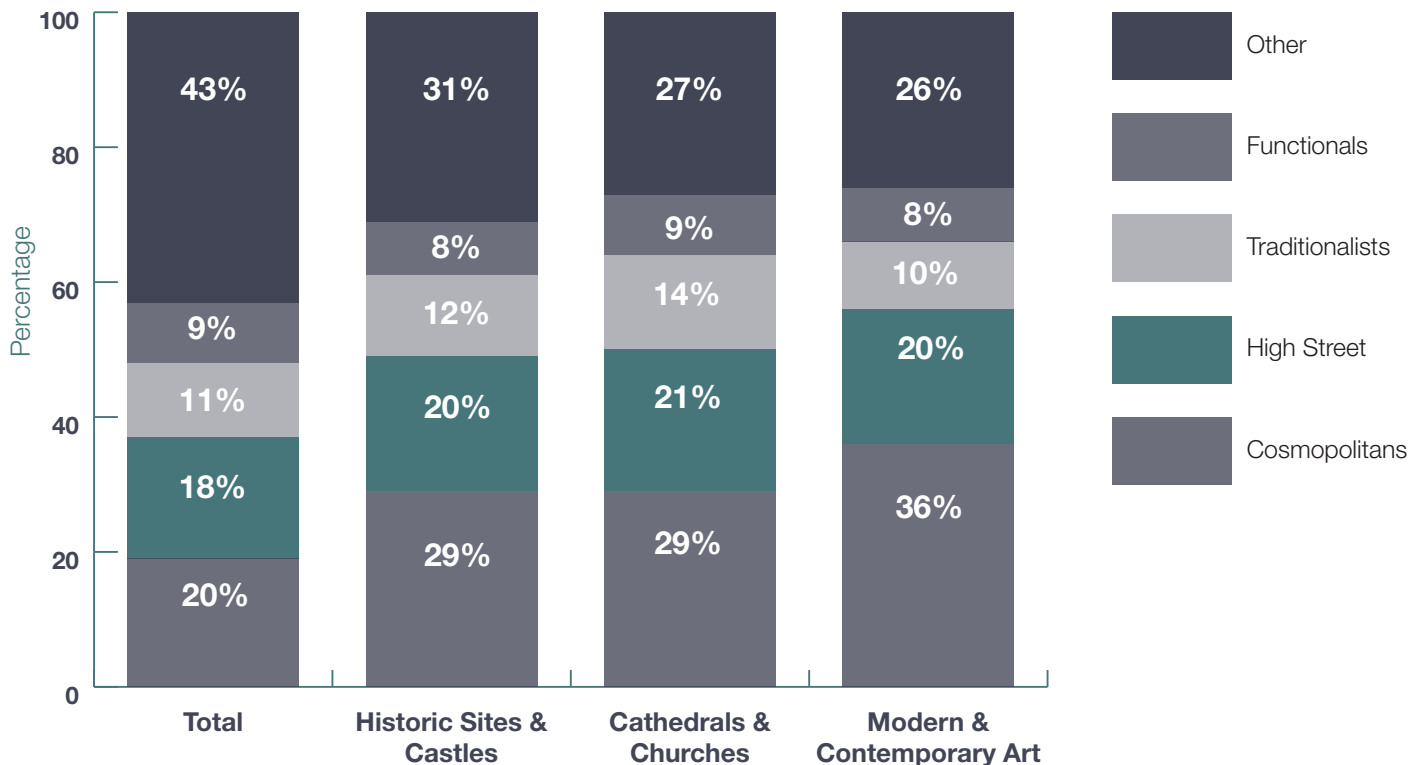


# Visitor Profiles

## Visitor Profiles

Research conducted by Tourism South East in 2009, highlights the significance of these market groups in relation to key elements of the core tourism product in Chichester District.

### Activities Undertaken at Least 3-4 Times a Year - by Arkenford Segment



# Visitor Profiles

## Visitor Profiles

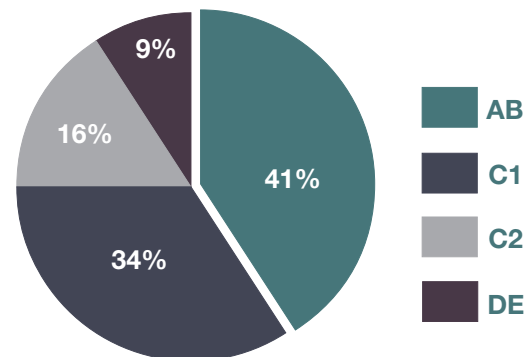
Chichester District has an affluent visitor profile. In 2008, 75% of visitors fell into the more affluent ABC1 socio-economic profile, with 41% falling into the most affluent AB group.

Socio-economic Profile – Benchmarked results

	% of UK Adult Population	Chichester (All visitors 2008)	Chichester (All visitors 2005)	All Historic Towns
	%	%	%	%
<b>AB</b>	22	41	39	28
<b>C1</b>	33	34	35	38
<b>C2</b>	25	16	19	21
<b>DE</b>	20	9	7	13
<b>Total</b>	100	100	100	100

The socio-economic profile of visitors to Chichester is based on the occupation of the households highest income earner and takes into account the previous occupation of those who were retired.

Chichester District has a higher percentage in the AB group compared to the rolling average benchmark for 'All Historic Towns' (28%). These figures highlight the potential opportunities for increasing the economic impact of tourism across the District through the enhancement of the visitor experience.



# SWOT Analysis

## Strengths

- Established brand image and reputation
- Effective marketing and public relations
- Wide range of accommodation
- Wide range of attractions
- Wide range of restaurants, cafes and pubs
- Established and renowned event profile (e.g. Chichester Festivities/Goodwood Festival of Speed)
- Vibrant city centre and strong retail offer
- Heritage, culture and the arts
- Protected landscapes (Chichester Harbour and the South Downs)
- Outdoor activities (e.g. walking and cycling)
- Established Destination Management Organisation and support from key stakeholders

## Weaknesses

- Lack of discernible 'wow' factors across the District
- Accessibility, congestion, car parking and transport infrastructure
- Limited financial resources
- Limited night-time economy
- Accommodation stock not quality assessed
- VisitChichester sufficiently capitalising on the tourism and events product (e.g. heritage/culture) through marketing and website development
- Inconsistent level of service quality across the District
- Limited engagement by the retail sector within the visitor economy
- Limited engagement with sustainable tourism and GTBS accreditation
- Limited levels of cross-marketing and networking between different attractions
- Not sufficiently capitalising on the student market in Chichester and related VFR opportunities
- Lack of research
- Lack of a qualified labour pool

[Drawn from consultation workshops October 2009]



# SWOT Analysis

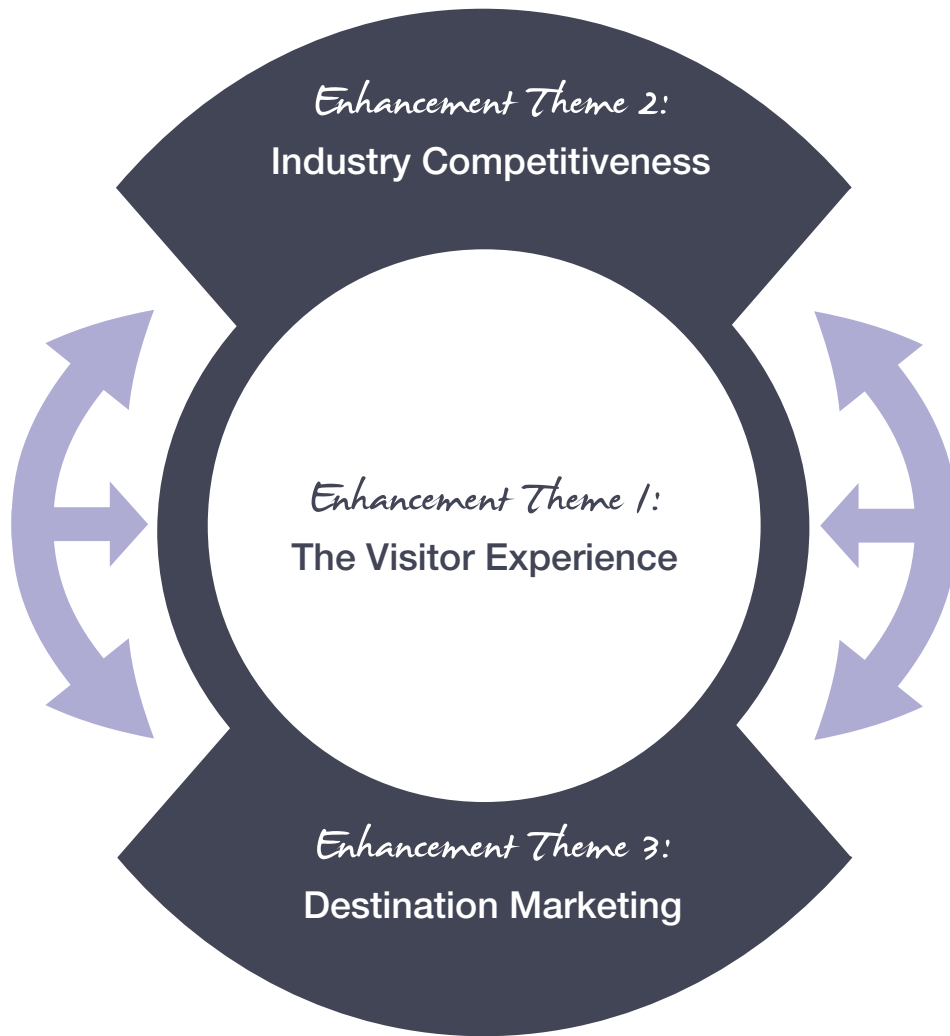
## Opportunities

- Niche marketing of specific product clusters (e.g. heritage, food, outdoor activities)
- Chichester City of Culture bid
- More effective integration and marketing of the Goodwood product (e.g. Vintage at Goodwood)
- Online marketing and the development of mobile technologies and the application of social media (e.g. Facebook/Twitter)
- DMS development to support the enhancement of the 'virtual' visitor experience
- Developing the short break market linking to product clusters
- Developing green tourism as a market differentiator
- Developing the student VFR market
- Expansion of the event portfolio across the District
- South Downs National Park
- Coastal Tourism (Chichester Harbour and Selsey Coastal Trust)
- Development of the night-time economy
- District-based grading and green accommodation
- Business training and mentoring, working in partnership with Chichester College and the University of Chichester

## Threats

- Competition from other heritage destinations
- Lack of financial resources
- Failure to achieve growth in the membership base of Visit Chichester
- Change in government and subsequent changes to regional planning and economic development
- South Downs National Park and identified tourism function

# Strategic Themes

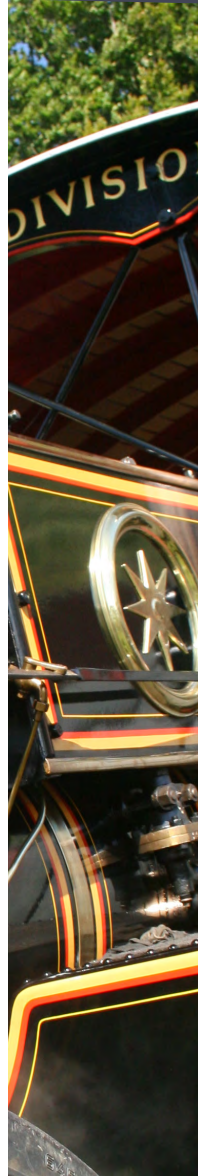


# Strategic Themes

## Enhancement Theme 1: The Visitor Experience

### Priority 1: Product Development

- a. Develop and promote new and existing products based around the primary tourism assets in Chichester and across the District
- b. Integrate products into short break marketing based around theme-led experiences to develop high value spending tourism
- c. Work closely with Goodwood to integrate the 'Goodwood Experience' more centrally into destination marketing and the short break package
- d. Work with regional partners to secure funding to support the development of new tourism products
- e. Promote existing products more effectively to the host community through more resident-orientated activity
- f. Review the quality of the existing product and opportunities for development through the Quality and Membership Committee to help co-ordinate and disseminate information between different sectors across the District
- g. Work in partnership with the Chichester City of Culture Bid to capitalise on the cultural opportunities within Chichester
- h. Work in partnership with the City Centre Manager to further enhance the quality of the retail experience and support the City Centre Manager's Business Improvement District bid for 2012
- i. Work in partnership with the Rural Towns co-ordinator to support the development of tourism in the market towns and rural areas of the District
- j. Work strategically with Chichester College and the University of Chichester to enhance the value of student VFR



# Strategic Themes

## Enhancement Theme 1: The Visitor Experience

### Priority 2: Customer Service and Quality Management

- a. Increase the number of quality assessed accommodation across the District and further develop the Visit Chichester Assessment Scheme
- b. Support industry participation in nationally recognised accreditation schemes
- c. Work with partners across the District to offer training and advisory to support quality enhancement
- d. Recognise and reward best practice across the District, through the creation of an annual Visit Chichester Tourism Awards Programme
- e. Appoint industry best practice champions as quality mentors
- f. Deliver high quality information services via the Tourist Information Centres to enhance the quality of the visitor experience
- g. Develop a parallel visitor information strategy to ensure that visitors and industry have effective, efficient and easy access to information they require in the most appropriate formats

### Priority 3: Research and Monitoring

- a. Work in partnership with the University of Chichester to implement a phased research programme to produce an accurate evaluation of tourism across the District and to ensure informed decision-making
- b. Work with attraction providers across the District to develop a generic customer feedback form to allow more effective benchmarking of the visitor experience across the District
- c. Develop online feedback mechanisms to enhance further the quality of the visitor experience

# Strategic Themes

## Enhancement Theme 2: Industry Competitiveness

### Priority 4: Business Support and Advisory

- a. Develop an industry-portal on the Visit Chichester website ([industryvisitchichester.com](http://industryvisitchichester.com)) to help facilitate the disseminate of industry best practice and act as networking hub for local businesses
- b. Support industry participation in nationally recognised training programmes (e.g. Welcome to Excellence)
- c. Work strategically with Chichester College and the University of Chichester to provide bespoke training and business development support
- d. Work strategically with Chichester College and the University of Chichester to allow the tourism industry to benefit from student placements, small-scale research and management projects, and event management support
- e. To capitalise on available funding streams (e.g. Rural Development Programme for England/ Collabor8) to support bespoke training opportunities across the District
- f. Appoint industry best practice champions as business mentors





# Strategic Themes

## Enhancement Theme 2: Industry Competitiveness

### Priority 5: Developing a Sustainable Tourism Industry

- a. Increase the number of businesses across the District involved in green accreditation, for example through VCAS Green Credentials or the Green Tourism Business Scheme
- b. To identify and support opportunities for the use of local goods and services, for example the Sussex Breakfast
- c. Support sustainable business practice through active engage with the West Sussex Sustainable Business Partnership and the University of Chichester
- d. Work with businesses and related stakeholders to explore opportunities for developing green tourism across the District
- e. Encourage businesses in the District to adopt a Sustainable Visitors Charter as part of Visit Chichester's commitment to the Place Making Charter
- f. Work in partnership with key stakeholders to develop infrastructure and sustainable transport networks to improve visitors' experience of the District with community and environmental improvements an added benefit



# Strategic Themes

## Enhancement Theme 3: Destination Marketing

### Priority 6: Marketing and Communications

- a. Develop a parallel marketing strategy to maintain the pro-active marketing and promotion of Chichester District as a premier destination focusing on brand and thematic-led activity
- b. Expand the range of information available on the Visit Chichester website and explore opportunities for developing micro-sites for theme-based experiences
- c. Develop online content through the use of social media and provide the infrastructure for more user-generated content
- d. Explore opportunities to develop the short break package based around itinerary planning
- e. Work with non-tourism business across the District to act as Chichester ambassadors supporting the development of business tourism
- f. Work in partnership with the South Downs Joint Committee/South Downs National Park to determine the most appropriate delivery framework for tourism





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