



VISITOR ECONOMY STRATEGY 2018 – 2023

FOR HORSHAM DISTRICT

October 2017

This project is part funded by
The European Agricultural Fund
for Rural Development: Europe
Investing in rural areas.





CONTENTS

| | |
|---|----|
| 1. INTRODUCTION THE HORSHAM DISTRICT STORY | 02 |
| 2. OVERVIEW OF THE DISTRICT'S VISITOR ECONOMY | 07 |
| 3. OPPORTUNITIES AND CHALLENGES | 11 |
| 4. THE VISITOR ECONOMY PARTNERSHIP: OUR VISION | 14 |
| 5. OUR AIMS | 16 |

1. INTRODUCTION

Why does Horsham District need a Visitor Economy Strategy?

The importance of the visitor economy in creating and supporting employment in the district is highlighted in the district's Economic Strategy as well as those of West Sussex County Council and the Coast to Capital Local Economic Partnership. There is a widely recognised need to support the sector and particularly the small rural businesses that are central to making Horsham district an appealing place to live, work and visit and that ensure visitor expenditure adds value to the district and its residents.

If the district of Horsham is to increase demand for its local businesses and increase the amount spent locally by visitors from outside its boundaries, it will need pride in what and who it is; it will need to be a cohesive place, with a common narrative, vision and clear goals.

As a district Horsham has the opportunity to be more than just an administrative area. There is the scope to strengthen Horsham town's association with its rural hinterland, which stretches from, and includes, the South Downs National Park in the south, to Gatwick and the High Weald and Surrey Hills Areas of Outstanding Natural Beauty in the north. As a visitor destination its strength is in its location, its hospitable market towns, traditional English landscape and its access to a wealth of surrounding attractors including Brighton, Chichester, the south coast and the South Downs National Park.

There is a need for a compelling district wide story that reflects what and who the district is for, why it is special and its ambitions. A story that shapes not only communications but also the actions of the public and private sector, behaviour, product development and the management of the built and natural environment.

HDC recognises the importance of the visitor economy and therefore commissioned this strategy, and associated visual identity, based on extensive engagement with communities and businesses, to create a story of the district that directs the strategic vision and priorities for activity that will support growth across the district over the next five years.

In line with Visit England recommendations for destination management, this Strategy is based on shared ownership and responsibility for delivery, working with organisations, businesses, groups and individuals that have a stake in the local visitor economy, including public, private and voluntary sectors, led by the Visitor Economy Partnership with Horsham District Council as a key partner. It identifies a range of actions to take the visitor economy forward, in line with the current Horsham District Economic Development Strategy.

The Horsham District story

This is the story of Horsham District based on what its stakeholders think about it as a place and the assets and relationships it has. It is a story we can relate to, that shapes our sense of place and guides our development.

There is no doubt that this is a very accessible and beautiful part of England with many inviting and interesting attractions and features of its own whilst being close to many more not least of which the South Downs National Park.

Our story explains what Horsham District has to offer, captures the essence of the area and will be what puts us 'on the map' for all the right reasons. The words we use will determine how we develop our offer through the way we communicate, what we build, the environment we create and how we behave.

Horsham District has many elements that are appealing to visitors and a great number of opportunities to grow and succeed as a place and these need grasping with energy and enthusiasm. Our approach is to create a place led collaboration involving public, private and community sectors to do things differently, put quality at the heart of what we do and give Horsham District the profile it deserves.

Whilst some elements of this story describe what we have and the way we are now, they also reflect what we want and need to be in the future; so our approach is both aspirational and rooted in a reality that can be experienced today.

Our story sets out the things we need to focus on to develop as a destination.

The themes of the Horsham District story

Roots and shoots

Whilst the area has some fantastic tourism businesses it needs more, and we also need to celebrate the area's successes. So we're going to build on the enterprise support already being provided by the local authority.

To maximise the potential of the visitor economy the district needs more accommodation providers from boutique hotels to glamping sites, more independent restaurants making use of local produce and more providers of local food and drink. Horsham District has to grow its own talent whilst also attracting entrepreneurs who see this as an area that supports enterprise.

We can only grow the visitor economy by being clear on who we are trying to attract to the area and then helping local businesses deliver great experiences for them.

1. INTRODUCTION CONTINUED

This means giving businesses the 'tools' to better do their job through everything from market research to the latest information on industry trends as well as promotional aids. This puts a premium on understanding our own visitor economy in the best way we can by collecting as much data as possible and monitoring performance so we can plan for growth.

Food and drink is already an important part of our proposition but it has the potential to grow further and be a central part of why the area is thought about and chosen as a destination. From breweries to vineyards, and local producers to independent restaurants, we have a great and quality story to tell and where possible we are going to extend and enrich the experience; cross promoting our events and festivals and developing new products and artisan experiences. We want to raise the profile of culture and heritage within the District, with 2019 being the Horsham District Year of Culture:



This is a year of cultural celebration, with a focused programme of events across 2019. We want there to be a cultural legacy left for the district which can be enjoyed by residents and visitors long after 2019. The Year of Culture is an ideal opportunity for us to tell the story of Horsham District.

We intend to use these opportunities to grow and create businesses thus producing higher paid jobs. To become a destination we need to make sure that the events and activities we develop are of sufficient quality and interest to bring people to our area from outside.

We are going to unearth and share our stories as these will bring our places and attractions to life making them more appealing to residents to visit locally, to those outside the area coming to visit and to those visiting friends and family who may be coming back to their roots or sharing time with relatives who live in the area. This links perfectly with being able to celebrate the history and heritage of Horsham District, the architecture and textures of our towns and villages and the landscape, wildlife and geology that all come together as our 'roots'.

Curious nature

Whilst our area might not be all about massive attractions we do have plenty to interest; the quirky and unusual from the Cat House in Henfield to the home of celebrity resident, writer Hilaire Belloc who lived in Shipley. These and many more are such fascinating stories celebrating both people and place. Visitors old and young love discovering things and being intrigued by what they find.

There's no doubt that when it comes to selling our area it is our beautiful natural environment alongside attractive market towns that come to the fore and we want to connect people with nature and wildlife and our places through our amazing landscapes and attractions. These come in many forms from the quintessentially English, rolling South Downs National Park to the ever popular RSPB reserve at Pulborough Brooks. Horsham District also benefits from the appeal of the High Weald and the Surrey Hills AONBs. These are places to explore and roam within, unearthing their natural secrets and glorying in a landscape that has been shaped over the generations by its communities, creating a very personal and intimate 'sense of place'.

We want to encourage local people to have a second look at their place and perhaps after a pub lunch take

a stroll around the villages and attractions across the area. It's amazing how you can see your own place differently through great signage, interpretation and storytelling: an opportunity to rediscover Horsham District through fresh eyes. This is where trails and the linkage of stories and assets come into their own to promote a journey of discovery, looking at the building textures in our villages, the twittens in Horsham or uncovering our crafts and local skills.

However, to deliver this we need to bring the place and the stories to life and that entails unearthing what's special and what's unusual and communicating that to our visitor businesses so they can act as storytellers; it means creating the trails and the marketing material to promote them, it means deciding where we want to move people from and to ensuring there is enough for them to do at each location and it means delivering our experience in an intriguing way.

This approach of challenging people to 'take a path less travelled' both literally and metaphorically speaking can play to our place strengths of independent businesses doing things differently, food and drink to sample, looking at our history, discovering our wildlife, decoding our landscape and exploring the estates and families that it has generated.

1. INTRODUCTION CONTINUED

The 'big idea' for the Horsham District story

The 'big idea' is a more emotional and behavioural statement of intent for Horsham District that sits above and alongside the themes.

Hub and host

As this story has already exemplified Horsham District is an amazing place with much that is attractive yet largely undiscovered. However, as we think differently and bigger about our location we see that we are at the centre of a wider experience encompassing the South Downs National Park, the High Weald, the Surrey Hills, the Gatwick Diamond, Brighton and the coast with London less than an hour away by train. There are lots of reasons to stay longer, so many experiences, so much to do and all so accessible from Horsham District. We intend to develop our destination as a hub from which to explore myriad places.

There's no doubt that we are the easy starting point with lots of transport linkages coming into Horsham District but we intend to work to improve these further. Alongside this, whilst we have some great accommodation in the area we want to get a wider

range; especially independent boutique style hotels and pubs, camping and glamping sites and enough quality, value providers for family budgets. We want to be the host with the most.

Critically, this means us working 'hand in glove' with our neighbours, creating visitor links from our hub to their experiences and promoting what they have to offer that is actually part of our wider story. Horsham District has the flexibility to develop services and facilities that can't happen in the National Park or Areas of Outstanding Natural Beauty; our aim is to be a base and, wherever possible get people into these beautiful places and back home to us again, having a great and interesting time whilst also caring for the environment.

We'll also be making sure that there is plenty to do and will be extending our cultural and events programme to keep residents and visitors entertained. Equally, we'll be an information hub for the wider area with everything you need to know on hand; whether for a Sunday afternoon stroll, a cycle through the Downs or along our rivers, to discover the best in English pubs or lose yourself in a dreamy landscape. At the end of the day we'll have the best of local food and drink to be enjoyed and a comfy bed to recharge ready for tomorrow!

2. OVERVIEW OF THE DISTRICT'S VISITOR ECONOMY

2.1 A strategic priority for economic growth

The Visitor Economy is the UK's sixth largest industry and one of the few sectors seeing substantial growth. By 2025 it is predicted to generate nearly 10% of GDP and 11% of Britain's jobs. As well as generating economic growth it supports facilities and amenities for local communities, encourages residents to stay and spend leisure time in the area; a confident outward looking destination contributes to attracting inward investment.

The growth of the visitor economy is an economic development priority for the C2C LEP, West Sussex County Council, the South Downs National Park Authority as well as Horsham District Council (HDC), where it is one of the five priorities in Horsham District Council's Economic Strategy.

2.2 Economic value

The district's visitor economy grew marginally in 2015 compared to the previous year; the sector accounts for 6.1% of all jobs in the district and its growth in 2015 was 0.8% for both jobs and visitor spend. In a sector that is predicted to grow nationally by 3.8% per annum to 2025 there is a clear opportunity to increase the benefits that the visitor economy could bring to the district.

2.3 Current performance

In 2015 there were a total of 3.1 million day and overnight trips to the district, generating an estimated total spend of £178.4 million. Day trips account for around two thirds of visitor spend but generate around 60% less per trip than overnight trips. In addition the average spend per trip (£88) is very low compared to the average of surrounding districts (£195).¹

The number of day trips (2.87 million) and the related level of visitor expenditure (£89 million) both increased in 2015 by 0.7%. Although only a small increase, this was a better performance than was experienced across the southeast.

By contrast, although overnight trips by domestic and overseas visitors showed stronger growth (1.9% and 4% respectively), the district was not fully capitalising on stronger national and regional growth in both domestic and international overnight visitors who generate higher levels of expenditure per trip than day visitors. Across the southeast domestic overnight stays increased by 5% and overseas visitors increased by 11%.

¹ See Appendix B Section 3

2. OVERVIEW OF THE DISTRICT'S VISITOR ECONOMY CONTINUED

2.4 Horsham's offer

The varied landscape, from the wooded north to the historic houses nestling at the foot of the Downs in the south; the central pasture and farmland crossed by the Adur and Arun rivers and an extensive public rights of way network, including a section of the South Downs Way and Chanctonbury Ring, make the countryside attractive and accessible to walkers, cyclists and horse riders.

Together the market towns of Horsham, Billingshurst, Henfield, Pulborough, Steyning and Storrington, with their diverse architecture and surrounding villages and hidden hamlets, offer a rich local history, attractive and convenient facilities, independent shops, lively festivals and interesting gastronomy.

It is a good place to live, traditional and safe, surrounded by protected landscapes, interesting places to visit and large urban populations.

The district is well located between London and the coast, close to Gatwick Airport with a good road and rail network. For both leisure and business visitors Horsham town is easily accessible, attractive and provides a wide range of convenient services.

2.5 Visitor facilities and services

2.5.1 Accommodation

Visitor accommodation in Horsham is primarily mid range; the majority (61%) is self-catering, with holiday lets and camping, caravanning and glamping sites. In the serviced accommodation sector, B&Bs, farmhouses and pubs with rooms make up the majority of properties and overall get a TripAdvisor rating of 4.5. The 22 hotels are mostly graded as 3 or 4 star, charging between £80 – £130 per room per night.



Figure 1:
Location
of Horsham
District

A third of serviced accommodation is located in or on the boundary of the South Downs National Park (which accounts for only 18% of the area of the district) reflecting the importance of the National Park as an attractor to the district.

The Hotel and Visitor Accommodation Study, undertaken in 2016, highlighted the need for additional visitor accommodation at all levels across the district, from budget to luxury, if the local economy is going to fully benefit from the demand to stay in the area.

2.5.2 Outdoor activities and cultural heritage

The district's attractions are mostly outdoors or small scale. There are extensive opportunities to walk and cycle, with eight promoted walking trails, as well as to play golf or fish and enjoy the wildlife.

Much of the district's larger scale cultural heritage offer is in private ownership and not fully open to the public; of the three castles, Amberley is a hotel and the castle ruin at Knepp is accessible to visitors on safari holidays, although the castle ruins at Bramber, managed by English Heritage, are accessible to the public. The historic houses of St. Mary's Bramber and Parham House have limited opening hours and Wiston is used primarily for conferences and weddings. For the visitor the district's heritage can be discovered in the museums of Horsham, Amberley, Henfield, Steyning and Storrington and through the telling of its local stories.

2.5.3 Gastronomy

The Horsham Food and Drink Festival, now in its 15th year, the Big Nibble, the Little Nibble, the food and street food markets, the food festivals in Steyning and Henfield and award winning local producers have all contributed to the district's strong gastronomic offer for residents and visitors. The strength of this offer is rooted in the district's agricultural heritage producing local meat, cheese, yogurt, ice cream as well as the many micro-breweries, vineyards, artisan bakers and chocolate makers.

The town and rural pub and independent restaurant offer extends across the district, with well-recognised restaurant brands in Horsham town where there is also a café culture.

2. OVERVIEW OF THE DISTRICT'S VISITOR ECONOMY CONTINUED

2.5 Visitor facilities and services continued

2.5.4 Events and festivals

The district hosts a number of festivals and events throughout the year designed to attract visitors and raise the profile of the district. Horsham town centre is the focus of the larger scale events including three car themed events: Piazza Italia at Easter, PlumJam Air Cooled VW Show and Cruise in May and Horsham AmeriCARna in September; the Food & Drink Festival also runs throughout September. Traditional music and street art festivals include the Horsham English Festival in May and the Big Busk in September.

To build on the success of the food and car festivals across the district a Piazza Italia Tour has been established, with local food and drink festivals in Henfield and Steyning and more encouraged.

2.6 Potential for growth

The district, with its good access, facilities and services and varied natural and built environment, lively events and surrounding attractions has the potential to increase the benefits that the visitor economy could generate.



3. OPPORTUNITIES AND CHALLENGES

3.1 Opportunities to strengthen the visitor economy

3.1.1 Accessible, hospitable, intriguing

Situated between London, the south coast and northern Europe, and with a good road and rail network, the district of Horsham is easily accessible to affluent markets in London, the south east, on the coast and from northern France, Belgium and the Netherlands who need to be aware of what the district can offer.

Our location is our USP, we are surrounded by natural attractions with the South Downs National Park to the south and the High Weald and Surrey Hills Areas of Outstanding Natural Beauty to the north; yet development in most of the district is less constrained by the restrictions that apply to these protected landscapes, creating the opportunity to provide easy access for visitors interested in enjoying the beautiful countryside in the area and also to provide them with additional activities, facilities and services.

The relatively flat countryside and extensive public rights of way (PROW) network in the district provide walking and cycling opportunities that are varied and easily accessible and complement the higher profile South Downs Way. The picturesque countryside, with its ancient settlements and hidden hamlets provide intriguing local stories for visitors interested in discovering and experiencing what's around the next corner; stories waiting to be told.

3.1.2 Untapped markets

There is a range of potential markets that are growing nationally and regionally, which the district could target:

- Domestic short breaks packaged to offer easy but high quality experiences; particularly from London, the south coast and across the southeast
- International visitors to the southeast, in particular the Dutch, French, Germans and Swiss
- A growing resident population
- Millennials, 21-35 year old young professional couples and groups of friends from London wanting active outdoor local experiences and good local food and drink
- Empty-nesters, active older couples with time and money, interested in local heritage
- Intergenerational family holidays needing large scale accommodation
- Leisure visits to stay with friends and family in the district
- Day visits from residents of coastal towns and their guests
- Popularity of distinctive, quirky or contemporary accommodation
- Demand for food and drink with local provenance
- Growing demand for wedding venues and accommodation
- Interest in learning experiences and educational courses
- Corporate demand for residential conferences
- Budget accommodation for contractors

3. OPPORTUNITIES AND CHALLENGES CONTINUED

3.1 Opportunities to strengthen the visitor economy continued

3.1.3 Growing the independent offer

This is an entrepreneurial district, with the second highest business start-up rate in the country, with 91% of businesses employing less than 10 people and 72% based rurally. Tourism has the potential to support the growth of these businesses.

There are a growing number of local producers and the existing local food and drink offer could be further strengthened by extending distribution through local hospitality businesses as well as direct to consumers at markets and festivals.

HDC provides a range of business support that could be focused on meeting the specific needs of the food and beverage businesses as well as accommodation providers and attractions, helping them to identify, understand and reach their target markets, support growth and build distribution channels.

3.1.4 Harnessing local commitment

The community partnerships and parish councils in the market towns are already proactive locally. Their work could be further strengthened by improving the co-ordination of these activities, to reduce duplication and increase cohesion and joint working.

3.2 Challenges to strengthening the visitor economy

3.2.1 The need for distinctiveness, vision and leadership

Although the district is surrounded by some well-recognised destinations, these are not well promoted.

Externally there is low awareness of the area and what it has to offer visitors. Its places of interest are of local rather than national interest, and need to be discovered, their stories told.

Internally it is considered as an administrative area, rather than a cohesive destination, with each market town focused on its own activities with little connection to the wider district.

3.2.2 Limited data, promotion, accommodation and venues

There has been no co-ordinated marketing plan and very little data on the sector's performance, or market analysis to direct the destination's management and marketing. The official district visitor website www.horshamvisitor.co.uk is run from Horsham museum along with the TIC, with very limited resources.

Despite low awareness there is a shortage of visitor accommodation in high season, which means that the district is missing the opportunity to attract higher value domestic and overseas visitors to stay longer and spend more.

3.2.3 A demanding market and strong competition

Visitors are becoming increasingly demanding, expecting high quality, good value experiences in a short amount of time. In addition the district has high profile, well-organised destinations on its doorstep. With strong competition and clients who are increasingly likely to share their good, and bad, experiences on social media there is a need for co-ordination and support for the sector's small and micro businesses.

3.2.4 Low businesses engagement

The general level of business engagement with HDC is low and there is poor take up of the current business support available; yet there is clearly a need, with marketing being a low priority for some businesses, who have a lack of digital marketing expertise and who find it a problem to recruit staff with appropriate skills.

Businesses often have to cope with high rates and low margins, which may restrict the necessary investment required to provide facilities that meet visitor expectations.

3.2.5 Getting around locally

Moving around the district without a car is challenging, for visitors that want to arrive by train or for staff who need to get to work by public transport. Bus services are disjointed with limited evening services and despite the extensive PROW network the cycle route infrastructure is fragmented.

3.2.6 Open to visitors?

Horsham district is considered a nice place to live, however for visitors some of its best assets may seem inaccessible with limited opening hours such as Parham House, St. Mary's Bramber and Wiston and only one of the district's vineyards offering public tours. However it is expected that Leonardslee Gardens may reopen to the public in the near future.

3.2.7 Champion required

Although the district's visitor economy sees marginal growth year on year, it lags well behind national growth rates. There is clear potential for the sector to generate increased growth and employment across the district. This requires committed leadership to engage a diverse and disparate collection of small and micro businesses, and the ability to build partnerships with organisations outside the district boundary.

4. THE VISITOR ECONOMY PARTNERSHIP: OUR VISION

4.1 The Visitor Economy Partnership

A cross-sector Visitor Economy Partnership (VEP) has been set up to adopt this Strategy, with the Horsham District narrative and visuals, and will oversee its delivery.

4.2 Our vision

The Partnership's vision for this strategy builds on the Horsham Economic Strategy Vision statement:

Think Horsham – a first choice business and visitor destination

To drive success and change across the district our vision is to be:

Horsham: hub and host



4.3 Visual identity

To support the vision and strategic goals a visual expression of the Horsham District story has been developed, specifically designed for use by stakeholders across the district. The visual language is a highly adaptable and evolving system, not just a static logo, made up of various elements including a unique visual language, a colour palette and typefaces. This allows the flexibility to turn focus up and down on aspects of the design and audience whilst still relaying one message, which feels and looks like the overall brand. It has been designed as a 'cousin' to the South Downs National Park visual identity, creating the district's own identity, while acknowledging the important relationship we have with the National Park.

A distribution plan for the visual identity to stakeholders across the district will be developed by the Partnership as part of a marketing plan.

5. OUR AIMS

Our aims in delivering the vision are:

Hub and host:

- i. To create a cohesive place with a vision and narrative that engages and works for all stakeholders across the district: for businesses, communities as well as visitors
- ii. To increase the benefits the visitor economy brings to the district and monitor its performance focusing on:
 - a. Attracting longer staying visitors and
 - b. Increasing visitor spend across the District
- iii. To be the base for a visit to our wider area, an easy place to reach, get around, shop, find information and travel out from
- iv. To have close relationships with and promote our valued neighbours, in particular the South Downs National Park, the AONBs, our coastal towns and Gatwick airport
- v. To build up our accommodation offer to meet the needs of our target audience

Roots and shoots:

- vi. To strengthen business growth by understanding our target audiences and providing products and services that meet their needs
- vii. To work with and support our local businesses, particularly micro and small businesses and food and drink experiences
- viii. To make our events a focus for the whole district, attracting outside audiences and addressing seasonality
- ix. To create trails to walk, cycle, ride or kayak, so guests can discover our wildlife, share our local stories and produce

Curious nature:

- x. To celebrate and promote our geology, landscape, wildlife and the vernacular architecture, old estates and the family stories it has generated
- xi. To celebrate our crafts and skills; our arts and culture
- xii. To discover and share our quirky less-known stories with our guests, encouraging them to take a second look

