Worthing Evolution

Tourism Baseline: Issues and Challenges

FIRST DRAFT

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1. Introduction

The purpose of this technical report is to review and assess the tourism product within Worthing, in terms of current performance, issues and challenges which are likely to impact on the vision and Masterplan for the town. The report also consider the town's competitive advantage, specifically those factors which are hindering the development of the local industry – both compromising competitiveness and constraining the capability of the local economy to generate the levels of income and profits needed to maintain standards and adapt to changes in market trends.

One of the difficulties in assessing the tourism product in Worthing is the lack of up-to-date statistics that exist in terms of visitor activity. Much of the baseline analysis has been compiled from discussions with tourism officers, particularly Kim Long (Tourism Manager) and local industry providers within the town and data contained within:

- Worthing Visitor Survey 2004 report
- Worthing Tourism 2004 Conversion Analysis (Carrier Direct Marketing)
- Worthing Borough Council STEAM report 2004
- WBC Tourism Section Business Plan 2005 – 2006
- WSCC draft Tourism Strategy

2. Context

2.1 Historical context

Despite all the forecasts for tourism to continue to grow in volume, importance and impact over the long term, the pattern of tourism in Britain continues to undergo fundamental change, influenced by competitive, economic and social factors. The situation in resorts is serious in that they are amongst the worst area nationally, when measured against a range of standard economic indicators.

Worthing historically grew up around the tourism industry. Indeed, visitors started to come to Worthing during the 18th century, promoted by the claims of the healing powers of sea-water. These first visitors were wealthy and fashionable people who expected a variety of entertainment, comfortable lodgings and regular dips in the sea. During the 1800's, Marine Parade (originally known as the Esplanade) was built and in 1861, Worthing Pier was erected at a cost of £6,500 by the Worthing Pier Company. The Pier was a success from the start and, despite various disasters (including gales and fires) development continued culminating in the Pavilion Theatre.

The town also saw a significant increase in hotels and boarding houses to accommodate the increasing number of visitors wanting to stay in the town. Various developments occurred along the seafront, including the Lido, which is currently run as a family entertainment centre.

Over the last 20 years, Worthing has witnessed a significant decline in visitor numbers. Visitor activity has declined as the resort became less popular brought about particularly with the massive competition of cheap holiday's abroad and full package holidays becoming more and more affordable, During the 1990s, Worthing has become "type cast" as a destination for the elderly.

2.2 Policy Context

Tourism is a fragmented sector, which is reflected in the regional, sub-regional and local structures in place to develop and promote the sector. However, the sector continues to be supported at a policy and programme level at a regional, county and local level.

The South East England Development Agency, in its role as sponsor of TSE and the strategic economic development body for the region, has a particular influential role to play by ensuring that tourism is treated as an important strand in the Regional Economic Strategy. While the sector is important in all areas of the region, it has particular significance for some of the priority regeneration areas particularly seaside resorts. SEEDA has allocated nearly £1 million per year for three years (2003-06) to support the sector. SEEDA's tourism delivery is undertaken by Tourism South East, the regional agency responsible for co-ordinating and developing tourism at a regional level through working with the private and public sector. The vision set out within Tourism ExSELLence (the tourism strategy for the region) is one that where the region:

- Competes with the best
- Exceeds visitors' expectations
- Invests in products and service quality
- Fosters profitable tourism businesses
- Welcomes visitors and embraces tourism

The region is performing well, yet is losing share to the rest of the UK and Europe in short breaks. Regional priorities for action include:

- Promote a must visit region;
- Provide an unrivalled experience for the visitor
- Establish effective management and organisation

To deliver the strategy, TSE organises itself into six sub regions and Worthing is within the Surrey and West Sussex Sub Region. Within sub regional priorities, there is recognition of the need to improve the appeal of coastal resorts as destinations for day visits, short breaks and longer holidays.

2.3 County-level

At a county-level, a confusing number of organisations have been established to support, develop and market the tourism product in West Sussex. West Sussex County Council has recently commissioned work to help identify strategic priorities for the county's visitor economy, and make recommendations for delivery structures. In addition to the consultation document which waspublished in April 2005,this strategic framework builds on the consultation process and sets out future priorities for action. Over 20 million visits are made to West Sussex every year: 87% are day visitors and the sector support 8.5% of jobs in the County. Key themes include:

- Wining hearts and minds – both within public agencies and the industry;
- Improving the visitor experience, including supporting coastal regeneration initiatives;
- Understanding the visitor economy, markets and brands;
- Competing for visitors, and
- Creating the visitor economy structure.

The report concludes that increased resources, a strategic approach and effective partnership working are essential if West Sussex is to compete in a competitive marketplace.

2.4 Worthing Borough Council

Although a non-statutory function, Worthing Borough Council has directed resources to help support and develop the tourism sector. Within the Council's Aspirations and Values, there is a priority to "continue to market Worthing as a town that is a strong centre for leisure, culture and tourism. However, there has been a significant reduction in Council spending to support to tourism activity since major re-organisation of Council services in 2000. The current budget, exclusive of staff costs, is £55,000 of which the majority is committed to CDM for destination marketing. Key functions include:

- Carrying out all national, regional and tourism destination marketing
- Membership of TSE and British Resorts Association
- Management of TICs
- Manages a contract awarded to CDM Carrier Direct Marketing for delivery of some of Worthing's tourism destination marketing, including preparation and distribution of the Tourism Guide.

The Council operates 2 TICs; a full time one in Chapel Road and a seasonal one of Marine Parade. In April 2006, the TICs are due to amalgamate and relocate in an area yet defined – the Masterplan will need to provide recommendations as to where this could happen.

Plans are evolving to bring the tourism functions of Adur and Worthing Councils closer together. Whilst this is unlikely to secure additional resources, it does strengthen the tourism product with additional accommodation providers and attractions

In addition, plans are well-advanced to establish a new public / private sector company, including representatives from the public, private and voluntary sector to direct al future destination work in the borough. The objective is that Visit Worthing will become the key strategic and operational organisation to support and develop the tourism sector.

3. Scale and Profile of Visitors

3.1 The local resident catchment area

Worthing is the largest town in West Sussex and is part of the West Sussex – East Sussex coastal strip, which stretches from Bognor Regis to Hastings, and includes the major resort towns of Brighton and Eastbourne. It has:

- A population of approximately 103,000;
- A population of approximately 2 million within a 40 minute drive time (basic day trip catchment);
- A population of over 9 million within a two-hour drive time (traditional short break catchment).

3.2 Scale and profile of visitors

Unfortunately, there is very little data upon which to draw and much of that comes from country-wide sources.

3.2.1 Size / profile of visitor market

In 2003 direct and indirect income from visitors to West Sussex amounted to £440 million – between 3 and 4% of total GDP. The industry currently employs 8.5% of the population of the county compared with 8% in the South east as a whole.

In terms of the local position, some economic impact data is available from the STEAM model (2004). Key local facts are:

- The town attracted around 1.8m visitors in 2004
- The tourism sector is worth around £75m to the local economy (4% increase on 2003)
- The sector employs in the region of 1,400 people (290 in hotels)
- Day visitors account for largest group of visitors (1.5m)
- 95% of visitors from domestic market: Surrey, Hampshire, Midlands
- Declining accommodation stock: 1,200 bed spaces – around 50% reduction in hotel bed spaces over last 10 years
- Short break coach market (grey £) remains important: however, in decline
- Declining business / conference market
- Staying visitors remains key category of visitor (15% of tourist numbers but 46% of total revenue)
- Low spending day visitors: £25pp (day visitors)
- Average levels of satisfaction: beach, seafront, access and location – all particular likes
- Little investment – public or private sector – to develop visitor product

3.3 Market Trends

The tourism market is volatile, subject to the longer-term 'drivers of change' and short-term issues e.g.:

- Economic trends;
- Demographic trends;
- Social trends including environmental and personal health concerns;
- Technical trends;
- Security crises; and
- The weather.

No one can say with any certainty what the cumulative impact of the drivers of change will be over the next five years and beyond. Generally speaking, there is a view that current growth is in:

- Day visits, particularly to 'free' destinations such as historic towns and rural honey-pots where visitors can indulge the popular activities of eating, drinking, shopping and walking/sightseeing;
- Domestic short breaks and additional holidays including social functions and VFR; and
- Business and conference tourism.

To a large extent, this is true but there are important qualifications to be made, which will influence future product development and marketing:

- the general outlook for tourism as a whole is promising but the short term is going to remain difficult for areas dependent on overseas visitors, particularly if the problems if the Middle East persist;
- visitors are looking for new and different experiences, to indulge special interests, have more active and enriching holidays with a range of things to do;
- visitors are more environmentally aware many are looking for the same ethic in their destinations;
- local distinctiveness is likely to become increasingly important as a driver of tourism and valued by visitors e.g. heritage, food, shopping, the arts;
- competitors are raising expectations and setting new benchmarks against which Worthing will be judged. Higher quality facilities are required with better value services that improve on standards elsewhere;
- visitors will spend less time on planning - and their holidays - getting more information and booking via the internet and new media.

Worthing must try and capture an appropriate share of the volatile tourism market and the niches for which it is best equipped, over the long-term, by focusing on maximising value through providing an appropriate product and promoting it effectively.

4. Worthing: Tourism Product

4.1 Accessibility

Worthing has reasonable road links. The town is served by the A27 trunk road passing through the northern edge of the town. Considerable congestion and delay occurs, specifically where the A27 shares a section of route with the A24 London-Worthing road, the main route into the town centre and at the two level crossings in Central Worthing. The A259 seafront road also runs east-west and carries predominantly local traffic, but acts as the overspill route when problems occur on the A27. The A259 does act as a physical barrier between the town and the seafront.

The south coast railway line provides good communications east (Brighton) and west (Chichester and Portsmouth) and a reasonably good service into London.

The bus network is fairly extensive but its effectiveness is limited by delays resulting from traffic congestion.

4.2 Attractions

The town has a limited visitor offer, with no critical mass of attractions. The town's core attraction is the seafront and Pier. The coast and seafront continues to be the primary reason for visiting the town. The seafront provides a major draw for visitors and includes a range of formal and informal leisure and recreational facilities including a range of shops, restaurant and theatre.

The general appearance of the seafront is diminished by the poor quality of street furniture and area of underused and vacant areas. Basic facilities such as toilets, signs, car parking and street furniture need to be maintained in good condition and working order so that the overall visitor experience is not prejudiced by impression of neglect. Clearly, the presentation of a high quality tourist environment around the seafront is crucial.

Apart from the appearance of the area, the seafront also suffers from a lack of facilities for informal recreation, specifically for children.

Opportunities for visitor activity at the seafront are key to the future economic success of the seafront as a tourist destination and not simply a local visitor destination.

4.3 Accommodation

Worthing and the surrounding area have a range of accommodation for visitors, which includes:

- 8 hotels
- 37 accredited guest houses / b&bs
- between 10-15 non-accredited guest houses / b&bs
- 11 individual self-catering advertisers within the current brochure (some offering more than one property).

There is no public camp site in the borough.

The accommodation provision equates to around 1,200 bed spaces, the majority of which (743) are provided within the town's hotels. There has been some investment in the accommodation stock, for example the Chatsworth Hotel has invested over £1.5 million to up-grade all its rooms. However, there is still a need for significant investment to up-grade and improved the standard of the accommodation stock within the town to meet customers expectations.

The coach market remains a core market for hotels in the town, specifically those offering organised short breaks for over 50s. This accounts for around 50% of the market, mainly from the Midlands, West Country and Wales. However, this market is in decline as elderly people become more discerning and adventurous regarding travel opportunities.

There has been a significant reduction is bed spaces within the town over the last 10-15 years. The estimate is that over 50% of bed-spaces have been lost over the last 10 years as more and more hotels have been converted for residential uses.

4.4 Town Events

Locally, events are attractive to host communities because it helps to develop local pride and identity. In addition, they play an important role for the national and host community in context of destination planning, enhancing and linking tourism and commerce. Some positive aspects of strategic events include:

- Events as image makers (e.g. Glasgow, Liverpool);
- Economic impact generators;
- Tourist attractions
- Overcoming seasonality;
- Contributing to the development of local communities and businesses, and
- Supporting key industrial sectors.

A strong events programme contributes to the broader regeneration of local communities, including renewal of town centres, environmental improvements and general retail shopping development.

Unlike most large towns in the region, Worthing does not have a Council-supported mixed-arts Festival. Since 2003, the Council has cut funding for arts and leisure, which led to the closure of the International Arts Festival. At the recent Worthing First Creative Conference, the desire for a town festival was one of the main outcomes and the Worthing Arts Council is now committed to establishing a Festival for 2006.

There are, however, a number of events (primarily arranged under the Town Centre Initiative), which bring the town to life as different times of the year. Local events include:

- French Market (TCI): April 15-16
- Durrington Festival: June 4-12
- Hamlet & Midsummer Night's Dream: July 12-24
- Worthing Motor Show: July 15-17
- Worthing Festival July 29-31
- Festival Fireworks Display: July 29
- Sunny Sunday Custom & American Car Show: July 31
- Bus Rally: July 31
- EBA National Bowls Championships: August 13-26
- Rotary Fair & Carnival Parade: August 29
- French Market (TCI): September 16-17

Worthing is the national centre for the sport of bowls, having hosted three World Championships in the 1970s and 1990s. Beach House Park, the National Bowls Centre, hosts the National Bowls Championships annually, as well as a range of other national and international events. However, little (or no) information is available regarding the economic / visitor impact of events within the town.

4.5 Business and Conference Tourism

Business tourism in the UK is worth over £20bn in terms of its wider economic impact. Over the past ten years, there has been a 53% growth in all business trips, exceeding the overall growth rate. Over 7 million visits are made to the UK each year for business purposes, with international business visitors contributing a massive £3.5bn to the British economy.

Trends in the business and conference market include:

- Shorter and smaller meetings;
- Shorter lead times;
- An increase in exhibitions held alongside conference;
- Buyers are more price conscious although factors such as accessibility and security are also increasingly important.

Worthing is able to offer a wide-range of venues to support business meetings and conferences. Venues include:

- Worthing Theatres: Assembly Hall, the Connaught Theatre and the Pavilion Theatre
- Hotels, e.g. the Berkeley, the Chatsworth etc.
- Specialist venues

Indeed, prior to 2000, the Council operated a Conference Office to support, promote and develop the business and conference market. This unit closed in 2000, with tourism being given "a lower profile role within the Council's activities." Following the closure of that central unit, there has been no co-ordinated marketing to attract business tourism into the town. Consequently, there has been a significant reduction in booking in business and conference tourism particularly at Worthing Theatres.

Despite the significant investment in major conference venues, specifically in Brighton and Bournemouth, there are opportunities for developing a stronger market share for conference business in Worthing. The town will never be able to compete with the larger conference towns, but it may be able to compete for a greater share of smaller conference / meetings. Associations are an increasingly important market for business tourism destinations. In the UK the number, value and budget of association meetings has overtaken corporate meetings. A greater number of associations will host member events, but budget, lead time and accessibility will be increasingly important factors in decision making. If Worthing is to extend its market share, it is vital to co-ordinate marketing efforts and build relationships with emerging organisations.

4.5 Arts and Heritage

Worthing is a historic town built on a past of entertainment and enjoyment. The arts and heritage sector has played an important role in the growth of the town and this has left an impressive infrastructure, including three theatre venues and the Museum and Art Gallery. The town has an active and developing arts scene, including a growing number of new media companies.

Arts and Heritage Attractions

Attraction	Number of Visitors 2003	Number of Visitors 2002
Pavilion Theatre	161,870	173,830
Connaught Theatre	110,833	116,976
Assembly Hall	87,928	85,965
Ritz Cinema	58,928	57,463
Museum and Art Gallery	54,697	47,169

The three theatres are owned and directly operated by the Council. They are run on a combined basis with one management team, an integrated approach to programming and marketing, a central call centre and a single technical team. Each of the venues plays a specific role in line with its distinctive architectural characteristics:

- Assembly Hall (capacity 930 seats, 1,100 standing): classical concerts as well as civic and social functions (home of Worthing Symphony orchestra)
- Connaught Theatre (capacity 506) / the Ritz (225): playhouse / cinema
- Pavilion (850 seats, 1,100 standing): entertainment showcase

In terms of visit numbers, the Pavilion accounts for 44% of the total, with the Connaught drawing 36% (12% for live events and 24% for Screens 1 and 2) and the remaining 19% using the Assembly Hall. The cinema operation provides a significant financial surplus, which is used to cross-subsidise other services.

There are a number of constraints, particularly the limited capacity at the Connaught which means it cannot attract larger shows and misses out on many commercial productions. All three venues have loyal database of users. Assembly Hall and Pavilion are multi-flexible and can be used for non-seating events.

The Council is among the highest spending in the County on cultural services. However, the theatre are ageing and despite some recent refurbishment will need further work to bring them up to the standards that audiences are growing to expect. The service has been subject to a number of reviews, which have looked at various options, including:

- Consolidation; closing 1 of the venues;
- Closing 1 or 2 or 3 and providing new facility, and
- Contracting-out management provision.

It is acknowledged that tourists make up a small but important component of audiences for local entertainment providers. The facilities attract visitors year round, but they are relatively small scale with a local focus. However, all three venues represent both in terms of providing a diverse / varied cultural offer and as physical assets owned by the Council.

The Museum has a specialist collection of costume and local archaeology as well as housing the Council's art collection. There is an active "Friends" group which supports the work of the Museum, and a number of local voluntary heritage groups with an interest in the town's history.

There is a general feeling that the town is not making the best use of its arts and heritage assets. There is an opportunity to develop the economic role of the sector, whilst at the same time using the assets to encourage higher spending visitor activity.

5. Visitor Survey

The Worthing Hospitality Association (WHA) in partnership with the Borough Council has undertaken a limited survey of staying visitors to the town. The results of the 2004 survey is based on a sample of 534 respondents staying in 15 establishments in the town. Key findings include:

- 75% stayed for between 1-3 nights (the majority – 33% - stayed for 1 night);
- 96% of respondents had no children – an increase of 3% on 2003;
- 85% of visitors came from the UK; the highest concentration came from London, Colchester, Birmingham and Bristol;
- 29% of visitors were over the age of 65 (82% were in the age range 36-65+);
- Visiting friends and family was the main purpose of the visit (34% of respondents);
- 31% were on holiday followed by 20% for sporting reasons and 14% on business;
- 63% of visitors placed Worthing as their primary place to visit;
- 83% found their accommodation to be excellent;
- 20% of visitors identified their accommodation via the Worthing Guide;
- 73% found Worthing to be a "good or better" destination of high quality (compared to 85% in 2003;
- 92% of respondents said they would visit Worthing again.

6. Competitive advantage: Issues and Challenges

6.1 Issues and challenges

There are a number of challenges that need to be addressed if the town is to transform itself into a modern seaside visitor destination. Currently, the town has a limited tourism offer; apart from the seafront and beach, there are few attractions for visitors visiting the town. Although the seafront is a key asset, it lacks activity and excitement.

The market is dominated by low spending visitors, specifically touring coach parties (older clientele) and day visitors. The tourism product needs to diversify to appeal higher income categories. The town does offer a varied arts and heritage product, but to date this has only functioned as a local resource.

The research available indicates a limited brand awareness of the tourism product in Worthing and there is a general perception that Worthing's tourism industry is in decline. The town has been type cast as a destination for the elderly and retirement centre.

6.2 Resort renaissance

The town is facing huge and growing competition from new products and destinations both at home and abroad. The demise of long stay seaside tourist holidays in the UK since the 1970's has caused widespread decline and a number of traditional resorts have been slow to adapt to changing market conditions and new opportunities driven in particular by growing and dynamic short breaks market. There is something of a renaissance in resort regeneration. Indeed, many of the resorts along the south coast have recognised the urgent need for change and are promoting exciting projects to revitalise their towns and create development and investment confidence.

Some of the best successes in terms of regeneration of coastal resorts can be found in smaller locations such as Whitstable in Kent, Camber Sands in East Sussex and Padstow and St Ives in Cornwall. In all these places, provided that the natural and built environments have retained their visitor appeal, just 2 or 3 small projects or innovative businesses have often made a difference in regenerating resorts.

In Whitstable, regeneration was achieved through creating a gourmet reputation for the town by successfully promoting the Whitstable Oyster. A similar approach has taken place in Padstow, where the location of Rick Stein's sea food restaurant acted as a catalyst for further investment.

In Herne bay, regeneration of the seafront (including the repair and upgrade of the Central Bandstand resulted in a 70% increase in day visitors during the winter and a 20% increase in the summer. Nearby Margate has just announced the start of building on its £25 million Turner Contemporary which it is hoped will revive an ailing tourist destination on the Thanet coast.

Regeneration in Eastbourne has been spearheaded by improvements to the public realm, specifically investment to the seafront. The Council has invested heavily in environmental improvements with a combination of hard and soft landscape projects which has also served to encourage a range of quality concessions on the seafront. The council has also prioritised events to boost tourism and has a strong programme and dedicated events team which has been successful in building large scale events such as 'Airborne' and more recently 'Skate'. Clearly Eastbourne has a very large bed-stock and there is a strong rationale for investment in its tourist product to create (or at least protect) job and local economic benefits.

6.3 Seaside town or town by the sea?

There is also no consensus on whether Worthing should develop its tourism industry or concentrate on becoming an attractive residential location. Since 2000, the Council has significant reduced its investment in marketing and developing the sector.

Worthing has long been established as a tourism destination and the town benefits from a number of key assets:

- Locational advantage, close to the South Downs and easily accessible to major conurbations
- Character and quality of the seafront
- A varied, if declining, accommodation stock
- Local centres of entertainment

There is an opportunity to re-create the town as a new, forward looking seaside destination offering a unique combination of an attractive urban environment, access to countryside, seaside, heritage, arts and culture. It is not enough for Worthing to bolster its competitive position.

The challenge for Worthing is to respond to the fast-paced social and economic structural changes and develop product opportunities which reflect the demands and aspirations of the contemporary visitor and local people.

7. SWOT analysis

STRENGTHS	WEAKNESSES
• Still seen as traditional seaside resort • Location and accessibility • Family market • Seafront (including safe and attractive beach) • Arts and heritage sector • Pier • Flat topography	• Declining accommodation stock • Limited attractions and facilities • Poor urban fabric • Lack of things to do: no wet-weather facilities • Low spending visitor • Anti-social behaviour and vandalism • Limited brand identity

Opportunities	Threats
• Exploit the area's location, which allows visitors to access a variety of experiences • Build on key assets: seafront, conference venues, cultural offer • Exploit investment interest / potential: resort renaissance • Commitment of public agencies?	• Further decline of traditional market • Further decline in bed spaces • Seasonality and lack of all-weather facilities • Increasing competition along the south coast • Continued fragmentation: policy and programme support • Lack of public sector funding to pump-prime investment

8. Creating a new role for the town?

Worthing does lack core ingredients of the tourism product mix: a critical mass of attractions and a limited accommodation base. Indeed, tourism alone cannot be a regeneration solution for the future development of the town. There will be a need to continue to grow and diversify the economy. However, tourism provides a major component of a more mixed base and should help to inform the future investment and development in the town.

The baseline audit report indicates some clear strengths and opportunities. The vision and masterplan must give due weight to the visitor aspect both in terms of maintaining and expanding existing market share but also raising the perception of what Worthing has to offer. The ambition must be to build upon these strengths and create not only a great place to live and work but also attract the most demanding visitors from both the UK and overseas.

The challenge for Worthing is to develop a clear framework and strategy to transform the visitor and tourism offer. There are a number of opportunities to transform the tourism and leisure "offer" toward a high quality, sustainable and economically viable product, valued by visitors and residents alike.

Components parts could include:

- A new vision and strategy for the seafront (including the Pier) and what it can offer;

- A major new cultural / mixed use attraction;

- Facilitating investment and enhancement to the accommodation base to increase the number, range and quality bed-space provision;

- Improvement to business tourism and conference facilities to build on the anticipated increase in business tourism;

- Positioning Worthing as a cultural tourism destination for weekend / short breaks

- Exploiting water sport, sport and recreation, to embrace the growth in water-sports activities and provide quality services and facilities that meet current and future aspirations.

As well as securing investment in tourism, leisure, sport and culture, the masterplan will develop Worthing as one of the best places in the region for restaurants, bars, shops and civic spaces.

The next stage will be to discuss the baseline report with key stakeholders and test and develop some of the opportunities outlined above as part of a tourism and visitor action plan within the over-arching vision and masterplan for the town.