

SUSSEX WINE TOURISM

A PLAN FOR GROWTH





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3 CONTEXT & MARKET ANALYSIS

This Growth Plan is funded by the UK Government through the UK Community Renewal Fund.
It has been led by a partnership which includes Sussex Modern, Plumpton College, the South Downs National Park Authority and the Sussex Visitor Economy Initiative coordinated by East Sussex County Council, West Sussex County Council and Brighton & Hove City Council and has been administered by Lewes District Council.

Thanks to the exponential rise in Sussex viticulture over the last ten years fuelled by strong collaborative working across the region, the county now finds itself in an exciting and unparalleled position at the forefront of the UK wine industry. Substantial engagement, research and development work has created a solid evidence base for future investment, making it clear that the Sussex wine industry is primed and ready for significant growth in tourism.

This new plan sets out that ambition, how it can be achieved, and what the continued growth in Sussex wine means to the wider region.





OUR VISION



**'Sussex wine
tourism:**

**world-class
experiences,**

**world-
famous
wine'**



By 2040, Sussex's expanded wine tourism offer will be a headline act in the region's visitor story, complementing its thriving visitor economy and attracting more higher spending international and domestic tourists.
This will result in...

**WORLD
CLASS
WINE
TOURISM
EXPERIENCES**

**REPUTATION AS
A SUSTAINABLE
TOURISM
LEADER**

**SUSSEX
WINE
TOURISM
BY 2040**

**£283M
IMPACT**

**3633
NEW JOBS**

Wine tourism will make a significant contribution to the visitor economy and the prospects for further sustainable growth are excellent. The objectives of this plan are:

1	The volume and seasonal spread of wine tourism experiences across Sussex will be expanded
2	Sussex's reputation as a global wine destination will be enhanced to attract higher spending international and domestic visitors
3	Growth will be achieved in a sustainable and responsible way
4	The Sussex wine tourism businesses will work collaboratively and ambitiously in taking forward this vision

These growth objectives are framed by the following principles:

Expertly crafted



Our emphasis is on stimulating good growth in high-quality products and experiences that align with a quality Sussex wine brand

Passionate about place



A responsible approach to wine tourism is at the forefront of the growth plan, maximising the positive benefits and supporting Sussex's transition to a low carbon economy

Celebrating people



Ensuring that all our communities benefit from growth and supporting inclusive products, experiences and events



‘Wine tourism’: what do we mean?

We are viewing wine tourism as the combination of a number of elements within a wine-producing region, marketed and delivered in a way that meets the needs of its key markets.

It extends from the growing of the grapes themselves, to the production process, to the finished product, and is typically delivered via tours, tastings and events at vineyards and wineries.



Although a form of tourism in itself, wine tourism in a region like Sussex — which has many strengths as an established visitor destination — is just one element of the wider visitor economy. It should therefore be viewed as complementary to the region’s other tourism assets such as its landscape, cultural and heritage offer, and its gastronomic experiences. And development should not necessarily be confined to vineyards and wineries.





Wine is an outstanding story for Sussex. It has emerged in the last few decades as a world-class wine-producing and wine tourism region pioneered by innovative visionaries. The same chalky soil as found in Champagne, an average of 1400 hours of sunshine and a long, steady growing season has seen the Pinot Noir, Pinot Meunier and Chardonnay varieties flourish. So much so that countless blind tastings and wine awards have seen Sussex Sparkling winning over Champagne.



888
HECTARES
UNDER VINE
25%
UK TOTAL

138
SUSSEX
VINEYARDS



The last few decades have also seen many of these vineyards diversify into wine tourism businesses with tours and tastings, cellar door experiences and shops, restaurants, visitor accommodation, events and wedding venues. With many of these businesses located in or near the South Downs National Park or one of our Areas of Outstanding Natural Beauty, care and protection of the environment is at the forefront of the viticulture and wine tourism offer.

Having recently secured Protection of Designated Origin (PDO) status for Sussex wine and with a Centre of Excellence in Viticulture, Oenology and the business of wine at Plumpton College, this is a region that has the necessary support and infrastructure to help wine businesses flourish.

From a fledgling sector, Sussex wine is increasingly a firm foundation of the region's visitor offer with potential to make a significant contribution to the **£2.5bn¹ growth target set out by the Sussex Visitor Economy Initiative.**

Achieving the **£283m target of Sussex wine tourism would make it bigger than the current value of all tourism in the Barossa Valley: **£135m**².**



¹ Sussex Visitor Economy Initiative. Vision & Medium Term Actions, 2021.

² Tourism Lessons from World Wine Regions. Jackman McGovern, 2021.



**GROWING
SUSSEX WINE
TOURISM**



Sussex will emerge as the UK's leading wine destination with a global reputation through a concerted and focused approach to development and marketing, which is creative, collaborative and market-focused.

Four Areas of Focus for Growing Sussex Wine Tourism



There is no one silver bullet that can help Sussex achieve success. Instead, there will be a comprehensive and coordinated approach that builds on the hard-won achievements, the destination strengths and an approach to quality and creativity that are the hallmarks of Sussex wine.

There are **four main areas of focus in developing Sussex wine tourism** illustrated here. These areas of focus are linked and success requires progress across each of them.

Specific actions within each of these four areas follow. Responsibilities and leadership for these actions will be determined by the Sussex wine tourism stakeholders. Some may be taken forward by local authority partners, destination organisations, by the Sussex Wine Industry Group or other private sector partners and some will require close collaboration between different stakeholders. Progress across these areas will require a coordinating organisation and resource to pull the different strands together.

1. Experience Development

With just over a quarter of vineyards currently offering visitor experiences, there are growth opportunities in expanding the number of 'wine tourism' businesses. Even among those that have developed comprehensive businesses, growth will come from scaling up operations and developing events and a broader offer.

Practical support is needed from public agencies to engage proactively with rural wine businesses looking to diversify their offer and grow the county's rural economy. The diagram opposite illustrates the types of experience development that typically exist across new and established wine tourism businesses.

Experience Development Journey






Vineyard Experiences

For many vineyards, taking the first steps on their wine tourism journey will involve the development of tours, education and tasting experiences. Finding a unique story alongside other established vineyards is critical if the overall Sussex wine tourism offer is to grow. Beyond these initial steps, further diversification and development of the offer will embrace retail, food, events, activities and accommodation.

Action	Develop a range of support including 'how to' guides and peer support networks for Sussex vineyards that are yet to introduce tours and tastings	Provide peer support and specialist advice to vineyards looking to further diversify the offer including advice on retail, food and drink, events, accommodation and activities	Work with the most ambitious vineyards to develop innovative visitor experiences that strengthen the distinctiveness of the Sussex offer e.g. balloon, paraglide, horse riding, night sky, nature and cycling experiences
Cost			



Accommodation Development

Visitors that come and stay are much more valuable to Sussex and its vineyards. At a Sussex level, staying visitors account for 11% of visits and 50% of spend. While Sussex already has a good range of quality accommodation, staying at a vineyard provides an experience that is distinctive. Some vineyards have had great success introducing accommodation which provides for individual and group visits and supports other business activity such as celebratory events, weddings and corporate events. Planning policies are mainly supportive of rural diversification especially where sustainability considerations in development proposals are addressed.

Action	Develop a best practice guide to vineyard accommodation development which explains in simple terms how to address the requirements of planning and how to identify potential development partners	Encourage use of permitted development rights and the 56-day rule to test short-term accommodation options such as camping and glamping, to assess demand and the business case for future accommodation development. Advice should be sought from the relevant local planning authority such as that available from South Downs National Park Authority	Attract investment to update existing Sussex accommodation in or near vineyards and provide a quality offer which meets the needs of discerning international and domestic wine visitors
Cost			

Orientation & Signage

Digital mapping has become one of the main ways visitors locate experiences and destinations they visit. However, signs on the highway remain an important tool to direct visitors to attractions. Physical and digital maps are valued tools for visitors providing a sense of the overall scale and location of key assets. A coherent identity for the collection of Sussex vineyards will ensure the scale of the visitor offer is understood.

Action	Agree a coordinated approach across Sussex vineyards for physical signage, working with relevant highways authorities to explore options	Produce digital maps for Sussex which can be downloaded and locate all of the region's vineyards as well as supporting products (e.g. heritage, culture, landscape)
Cost		

Programming & Events

Creating a year-round visitor offer is important to ensure tourism is sustainable. A year-round business can improve cash flow, retain staff and invest in skills, training and development. Too many tourism businesses see fluctuating demand. Wine has the benefit of having stories to tell year-round. The growing patterns, harvesting and production mean there is always something new to experience. Developing a comprehensive programme of events and activities can bring visitors to the site at times of the year that are otherwise quieter. Having the facilities for events also supports diversification with an ability to host weddings, celebratory events and meetings. If Sussex is to become regarded as the UK's pre-eminent wine tourism destination, a major pan-Sussex wine festival could help build cohesion and cement that reputation.

Action	Develop a guide and other support for vineyards to plan and programme events. Work collaboratively with cultural organisations to produce events that animate the experience year-round	Produce best practice guidance on the design and development of meeting/events spaces in vineyards to ensure that facilities meet the needs of organisers and support other business areas/revenue streams	Prepare a feasibility study and concept for a signature event — a Festival of Sussex Wine. Consider using a 'Year of Sussex Wine' as a way to test market demand and partner collaboration
Cost			

**BEST PRACTICE CASE STUDY
ON EXPERIENCE DEVELOPMENT:
VASSE FELIX, AUSTRALIA**

Having been established in the 1960s, Vasse Felix has grown into a premium 'lifestyle' brand with a sophisticated programme of vineyard experiences and events.

Established in 1967 as Margaret River's founding wine estate, Vasse Felix has developed an enviable spectrum of experiences across its four vineyards to generate value from visitors when they are on site and also create long-term relationships with them when their visit is over. Vasse Felix offers a range of premium and

distinctive visitor experiences, including estate tours as well as access to its art gallery, museum, wine lounge and restaurant. Visitors to Vasse Felix vineyards can join the Alumni club — offering access to advice, news and wine subscription benefits available only to those that have visited the estate in person.



What it does well...

A range of wine tours, starting at \$50 AUD per person for the 'Original Tour' at Vasse Felix's founding vineyard to a 'Cape to Vine Tour' at \$640 AUD per person, which includes a coastal tour and culminates in a five-course tasting menu at the brand's award-winning restaurant. Most tours are bookable online

Hosts wine tastings where sampling is tailored to the visitor's wine knowledge/confidence, so experiences feel personalised

Offers both informal and formal dining options, including wine pairing with charcuterie

A programme of annual events to spread visitation across the year. Events focus on a cultural offer, including classical music and art. Art exhibitions often celebrate local and Indigenous culture of Western Australia

After-sales and global distribution. A strong offer for the export market with wine subscription packages, including international delivery and advice on at-home wine care available via the Wine Porter service



Nathan Coley, 'A Place Beyond Belief', installed at Rathfinny Wine Estate by Sussex Modern

The vineyards of Sussex are all at different stages in their wine tourism journeys, and many now have fully developed visitor offers, with a range of food and drink options, overnight accommodation and complementary events alongside the traditional








tours and tastings. In Sussex, vineyards have collaborated with cultural attractions nearby, for a fully realised tourism offer for domestic and international audiences based on the three pillars of Wine, Art and Landscape, under the brand of Sussex Modern.

2. Marketing and Positioning

Sussex wine tourism will be successful if it converts more of Sussex’s visitors to wine tourists. But it also needs to help grow the visitor base to Sussex too, and ensure that the visitors it attracts bring the greatest benefits with the smallest impact. Staying visitors from target markets ‘Enrichment & Exploration’ and ‘Dynamism & Discovery’ attracted by the wine tourism offer will create economic growth and employment.

For some visitors, ‘wine experts’, the wine tourism offer will be capable of driving visits on its own merit. But for others, ‘wine interested’, the offer will be part of a broader Sussex experience that encompasses wine, landscape, heritage, culture and gastronomy. The opportunity for wine tourism businesses is to be able to positively influence both of those groups, dialling up or down complementary experiences as part of their narrative.

A stronger profile for Sussex Wine will grow advocacy among local communities and Sussex hospitality businesses who should be at the forefront of consumption and sales, amplifying the messages about Sussex wine and wine tourism opportunities.

Positioning & Narrative	
Action	<p>It is vital to develop an overarching positioning and narrative for Sussex wine tourism. This would include a brand and identity, but should also provide businesses with a broader toolkit that can be used to help them talk consistently about the offer so that it achieves cut-through in the marketplace.</p> <p>Develop a narrative and toolkit that provides content for use by vineyards and partners to promote the Sussex wine tourism offer. Ensure this content is driven by market perceptions and that it offers a compelling and distinctive story which will help the sector grow</p> <p>Develop a calendar of illustrative stories that can be used to inspire the communications and marketing activity of wine businesses. Use the product USPs (largely sparkling production) to align with celebrations and celebrating (family events, life events, sporting events)</p>
Cost	<p> </p>
Marketing Delivery	
Action	<p>There is a role in supporting vineyards and wineries to take their tourism product to market, especially those smaller operators who may not have in-house marketing functions. Creating a thematic framework around which businesses can coalesce may make marketing their product feel more manageable, as well as providing inspiration and helping Sussex to build ‘one voice’ around its wine tourism offer to achieve a bigger impact.</p> <p>Create a top line marketing campaign plan for Sussex wine, setting out seasonal themes for the year ahead e.g. ‘walking & wine’ whereby destination partners and businesses are encouraged to promote local walking routes via their own channels — social media, website etc — for a particular part of the year</p> <p>Run a centralised Sussex Wine PR programme linked to the topline marketing plan to build traction with the media and with delivery partners such as VisitEngland/ VisitBritain that gives businesses the opportunity to gain exposure by feeding in their stories, news, events etc</p> <p>Create centralised seasonal social media content (images and text, reels) for distribution to vineyards and partners — including a hashtag/s for Sussex wine — that they can schedule into their own content plan. Content may hang on specific dates, anniversaries, regional events</p>
Cost	<p>  </p>
Tours & Distribution	
Action	<p>There are some successful independent wine tourism tour operators in and around Sussex. They should be supported to grow and develop. They help Sussex vineyards to generate business and overcome obstacles such as a lack of public transport. In addition, other operators and travel trade should be encouraged to include Sussex wine tours within their programmes where they are targeting similar market segments.</p> <p>Support existing and emerging wine tourism operators to expand the product and range of tours they offer and their market reach by including them in campaigns and PR activity</p> <p>Promote the Sussex Wine Tourism product to inbound operators, ground handlers and travel trade via membership of sectoral bodies (ETOA, UKInbound etc) and Sussex wine tourism participation at B2B events</p>
Cost	<p> </p>

**BEST PRACTICE CASE STUDY
ON MARKETING & POSITIONING:
NAPA VALLEY**

California's Napa Valley has created a distinctive and attractive international profile via a compelling destination narrative and brand.

Napa Valley is one of the most globally prominent wine regions of the USA, welcoming 3.85m visitors in 2018 and delivering \$2.2bn USD from visitor spend. Napa is positioned as a place where people can 'experience a taste of the good life'. The Visit Napa Valley website brands the destination with a distinctive logo and is rich with video imagery which celebrates the county's viticulture, wine routes, food and drink experiences, and dramatic landscape. Visit

Napa Valley is the area's official Destination Management Organisation (DMO), led by a board largely consisting of private sector members from across the wine industry, hospitality and transport sectors. Marketing focuses on promoting overnight stays and driving footfall during the November to April 'low season'. The destination has 160k Facebook followers and 144k followers on Instagram.



What it does well...

A comprehensive destination website which brings together the multitude of the destination's experiences (including wineries, dining, events and attractions) in an informative and accessible way

'Branded' wine routes like Highway 29 and the Silverado Trail enable easy planning of wine, food and retail experiences

Wine retail and tasting rooms can be found in the four main towns of Napa County, so wine tourism experiences also reach visitors outside of vineyards

The Visit Napa Valley website also includes resources for the travel trade — including a planning toolkit to make Napa an 'easy sell'

Targeting of the MICE market is also a priority with detailed resources on venues, transport, dining and team building experiences. MICE travel managers can request a proposal directly via the website









Since 2017, an independent consortium of Sussex visitor businesses have come together as Sussex Modern to tell a new, joined-up story of Sussex based on the three pillars of Wine, Art and Landscape. By switching the tourism narrative away from sleepy villages and

coastal retirement towns, the region is marketed as now home to a vibrant, youthful culture for audiences with metropolitan tastes for high-quality wine and world-class art — all within breathtaking landscapes and easy reach of London.

3. Responsible Wine Tourism

Sussex wine tourism has the potential to lead in the development and delivery of sustainable and responsible tourism experiences in Sussex. While the process of growing and producing wines can result in the use of pesticides and herbicides, which impacts on water supply, water quality and nature, there are many examples of best practice to manage and mitigate these concerns. Moreover, visitor markets are increasingly seeking experiences which are good for local communities and the environment, and Sussex wine tourism has a good story to tell.

<p>Sustainable development</p>	<p>There is a range of advice and support in developing sustainable and responsible vineyards and wine tourism businesses, including from WineGB, South Downs National Park and the Living Coast. For wine tourism to grow in Sussex, development is an inevitable consequence. Ensuring that development has regard for the environment and seeks to enhance nature is not only good for the planet but for business too.</p>			
<p>Action</p>	<p>Work closely with vineyards that are planning to grow, on master plans and feasibility studies to bring concepts to fruition. Ensure emerging plans incorporate sustainable best practice</p>		<p>Encourage adoption of Sustainable Wines of Great Britain accreditation among Sussex vineyards</p>	
<p>Cost</p>				
<p>Sustainable & Active Travel</p>	<p>As largely rural enterprises, vineyards are hard to access by public transport. However, Sussex has an extensive network of cycle and walking routes. While there are well-established routes such as the South Downs Way, Cuckoo Trail, Downs Link and National Cycle Network 2 (coastal), the options connecting vineyards to the north of the Downs are more fragmented.</p>			
<p>Action</p>	<p>Identify and promote a network of active travel trails and links connecting up wine experiences for 1-3 days with supporting infrastructure, e.g. bike hire, luggage transfer and itinerary suggestions. Engage with specialist bike hire and bike tour operators</p>	<p>Work with the sustainable travel planners at East and West Sussex County Council and partners such as Sustrans on the development of a great Sussex wine route, using existing and new trails to build a world-class route</p>	<p>Team up with Good Journey to develop car-free journeys for vineyard visitors and achieve the Good Journey Marque</p>	<p>Expand adoption of EV charging throughout the network of Sussex vineyards</p>
<p>Cost</p>				



Much of Sussex falls within the South Downs National Park and other designated areas of Outstanding Natural Beauty, so care for the landscape and a responsibility for nature has always been an integral part of the Sussex wine

story. Many wine estates are located within walking or cycling distance from a sustainable transport hub and promote their own walking and cycle trails — making it possible for visitors to leave their cars at home.

BEST PRACTICE CASE STUDY ON RESPONSIBLE TOURISM: MARGARET RIVER REGION

The Margaret River region in Western Australia is a leader on sustainable and responsible tourism with wine experiences at the heart of its offer. Its best practice credentials are outlined below.

Margaret River Region is a certified ECO destination and has positioned itself as a leader in sustainable tourism, where visitors are encouraged to 'connect deeply [but] walk softly'. The region's website has comprehensive guides to make it as easy as possible for visitors to make environmentally responsible decisions, with an information section dedicated to sustainable travel. The website includes eco-conscious itinerary planning, as well as practical responsible travel tips and a guide to sustainable accommodation.



What it does well...

Encourages all-year-round visits by promoting distinctive seasonal events and experiences

Lists accredited eco-experiences on its website and frames sustainability as a desirable 'lifestyle' choice

Celebrates Aboriginal culture — encourages visitors to discover more about living in harmony with the land and environment via experiences led by Aboriginal cultural custodians.

Offers a unique destination experience rooted in sustainability

Involves the local community in decisions around environmental awareness and action. Local authority leadership combined with community buy-in has been key to the acceptance and adoption of the destination's 2040 Strategic Community Plan

4. Working Better Together

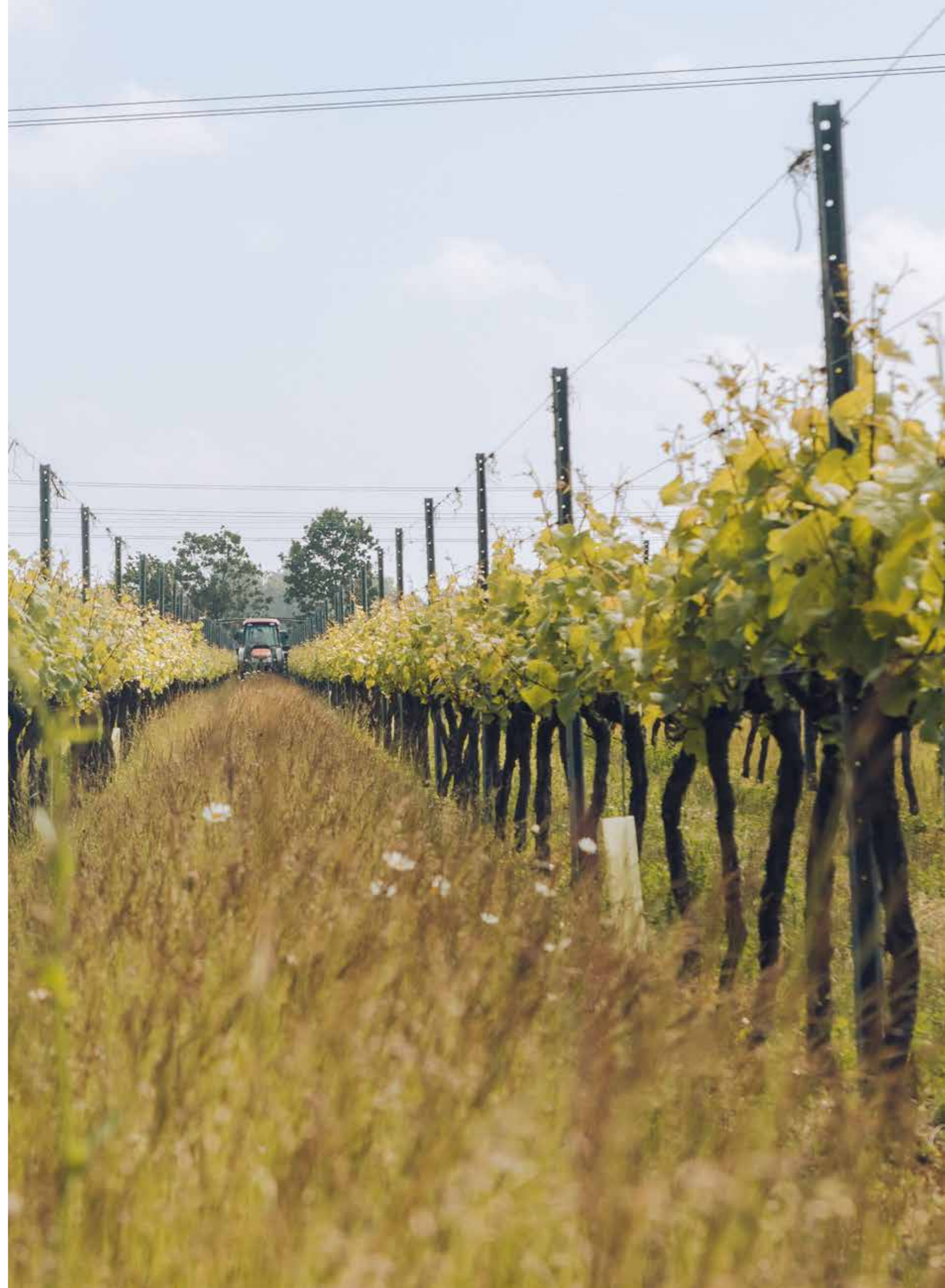
Success will be achieved by working together, growing the size of the cake rather than worrying over how the current cake is carved up. This is about more than joint marketing. It means bringing all of the wine businesses together on this journey, to lift the quality and breadth of experiences on offer.

This will improve communication and knowledge sharing across the public, private and third sectors to support and increase the number of businesses delivering quality experiences for groups and individuals.

Working with industry to develop creative itineraries and experiences based on spatial clusters in Sussex, combining sustainable travel components that meet the needs and expectations of visitors while making sure they deliver an outstanding experience and a positive impact on the destination.

The projects in this growth plan need resources (money and time) which, while challenging in the current financial climate, will payback many times over in economic growth.

There is a clear commitment and desire for collaborative action and the report and plan will be jointly owned by all sectors involved in supporting the growth and development of Sussex wine tourism. There also need to be mechanisms to engage and listen to rural communities to ensure they experience the benefits of wine tourism.



Launch of report and growth plan

As well as celebrating the success of Sussex wine, there is a need to improve the awareness of the opportunity and potential of wine tourism in Sussex. Ensure that all partners, stakeholders, businesses and communities are aware of the report and are engaged in the delivery of priority actions.

Action Growth plan launched to industry and stakeholders

Cost 

Itineraries and bookability

Focus on the unique assets to help visitors make sense of the breadth of the offer by developing itineraries that show what can be achieved in 1-3 days across a variety of businesses and across the county. These should include related experiences (activities, landscape, culture, gastronomy etc)

Action Create themed itineraries and wine trails for both independent and group travellers to extend visitor days and stays Develop bookable products to increase collaboration with the travel trade and support inbound tourism initiatives through packaging quality experiences Create sustainable travel itineraries — bus, train, cycle/hire, e-bikes — that make it easy for visitors to explore wine experiences more sustainably

Cost   

Spatial Clusters and Wine Tourism Hub

Clustering is an effective way of building a critical mass of experiences, which encourage visitors to come more often, spend more, stay longer and recommend the experience to others. Sussex has a variety of assets and there are opportunities to develop and package experiences around spatial destinations, tying in a variety of touch points along the customer journey — accommodation, food, transport and activities including wine. Analysis of different options for a Sussex Wine Tourism Hub, which could act as a focus for wine sales and promotion of the vineyard visitor experiences, has also been explored with three preferred options emerging (Vineyard model; Information/Orientation centre model; Visitor attraction model)

Action Develop three pilot Cluster Collaborative Working Groups in Sussex where wine tourism is a core activity Agree preferred options on a Wine Tourism Hub/s and progress to business planning

Cost  

Data & insights

To justify the continued development of Sussex wine tourism, there is a need to create more evidence and research into the potential audience, demand and visitor market segmentation. The prospectus and plan will be supported through ongoing research and insight into behaviour to guide marketing and product development, including investigating the use of more dynamic, live information and the application of big data.

Action Develop a cost-effective data and insights project to capture consistent and accurate data to aid future product and campaign development Develop a monitoring and evaluation framework to ensure effective progress management of the growth plan

Cost  

Partnership

The Sussex Wine Tourism Growth Plan will be owned and delivered through a network of focused partnerships, which will play an active role in the regional development of wine tourism. A core activity will be to attract national and regional funding through collaborative partnership working. Relationships and collaboration with any new Sussex based LVEP (Local Visitor Economy Partnership) will be critical to access support and funding through a new nationally recognised framework for visitor destinations.

Action Establish a Sussex Wine Tourism Leadership Group that will oversee delivery of the priority actions and ensure a coordinated approach in delivery Establish a Funding Task and Finish Group to identify funding models and pursue and secure external funding to implement the Plan (including resource for a dedicated Project Manager post) Establish a Wine Tourism Business Peer Network to inspire, motivate and support new and developing wine tourism businesses to exploit new opportunities and build resilience Develop a Sussex Wine Tourism Charter Marque to reward and reflect excellence and sustainability in wine tourism. Support national accreditation schemes for wine tourism that VisitBritain or WineGB may introduce

Cost    

**BEST PRACTICE CASE STUDY
ON COLLABORATIVE WORKING:
MARLBOROUGH, NEW ZEALAND**

Collaborative working across all sections of the visitor economy has been key to the success of Marlborough's growth as an international destination with wine tourism at the centre of a rich and highly varied visitor offer.

Accounting for just 1% of the world's wine but with 20% of inbound tourists visiting the country's vineyards, New Zealand has a notable international profile for wine tourism relative to its level of wine production. This is largely thanks to the efforts of producers in Marlborough, the country's largest and most visited wine region. Through collaborative working with businesses across the visitor economy, Marlborough has developed a true 'vinescape' attracting \$411m NZD in visitor spend in 2019. Destination Marlborough is the region's DMO — a public-private partnership responsible for destination management and marketing under the 'brilliant every day' proposition. This body also manages local tourism information centres, travel trade relationships, and Business Events in Marlborough for the MICE market.



What it does well...

Wine tourism positioned as the gateway to the range of experiences available in Marlborough. Visitors able to search and plan itineraries based on their personal travel style (e.g. luxury, family, adventure, gourmet etc.)

Publishes a range of 'Insider Guides' from a variety of businesses operating across the visitor economy so that visitors can experience life as a local during their trip

Has created online visitor guides around key activities such as wine tours, culture, sports and cycling which showcase experiences available in the region and includes an itinerary builder where visitors can select bookable products

Employs quality marques to reassure visitors — including the 'Golden Mile Bike Friendly Stop' scheme for vineyards who actively welcome cyclists along this active travel route. Marlborough tourism businesses also prominently display their national Qualmark accreditation to demonstrate their sustainability, safety credentials and warm welcome



Fostering collaboration over competition, the wineries of Sussex work together with cultural partners and landscape organisations under the banner of Sussex Modern to tell a joined-up story of the region and

encourage visitors to see more of Sussex. Online and printed visitor guides and place stories help circulate tourists between the region's vineyards, art galleries and cultural destinations.



**CONTEXT
& MARKET
ANALYSIS**



As a key player in a fast-growing industry — both in terms of hectarage and production — Sussex is well placed to become the predominant force in English wine with an abundance of suitable land available to put under vine. Wine tourism is a growing multi-billion dollar global industry, which is projected to be worth up to £658m³ in the UK by 2040.

Sussex wine tourism could be worth up to £283m by 2040 if the actions in the growth plan are delivered. Consequently, the potential to grow Sussex wine tourism and deliver positive socio-economic benefits for the county over the next two decades is significant.

³ Source: WineGB Trade Survey Results, 2018.



**UK WINE
INDUSTRY
£658M
BY 2040**

With a sustainable and high-quality approach to viticulture alongside an enviably rich and diverse tourism offer, Sussex can become the UK's leading destination for wine production and tourism. Around a quarter of Sussex vineyards offer tourism experiences, so there is potential to expand the visitor offer.

Wine tourism can attract high-value visitors who care about sustainability and who are likely to explore the breadth of a destination, delivering economic impact and supporting jobs via multi-experience staying visits. Studies have shown that wine tourists spend more than mainstream visitors, with domestic visitors spending 32% more and overseas visitors spending 80% more than the visitor average.⁴

This report draws on the wide-ranging studies and research undertaken during 2021 as part of a Community Renewal Funded project illustrated here:



⁴ Source: www.vineyardmagazine.co.uk/sales-and-marketing/the-value-of-wine-tourism

Wine Industry Context

The National Picture

- Consumer demand for wine is increasing. Total UK wine sales (including international imports) will deliver £17bn of value in 2022, with annual growth predictions of 13.9% to 2025⁵
- GB viticulture has experienced exponential growth over the last decade. Land under vine has increased by +173% since 2011, with production between 2015 and 2019 increasing by +78% to 10.5 million bottles p.a.⁶

Sussex Viticulture

- At a combined 888 hectares, Sussex vineyards represent 25.5% of GB land under vine (second only to Kent at 29.6%)
- There is enormous growth potential for Sussex wine with 40,000 hectares of suitable growing land available. If just 10% of this came under vine, it would yield an area larger than the whole current GB viticulture sector (currently 3.5k ha)
- Most Sussex vineyards are small or micro-producers (83% are under 10 ha). Nevertheless, the nine largest vineyards account for 40% of all land under vine across the county — a significant contrast in scale between a small number of established businesses and the majority of producers
- Sussex wine is estimated to have generated £109.8m of value in 2020 for the local economy⁷
- Sussex has been awarded Protected Designation of Origin (PDO) status by DEFRA for Sussex wines, reflecting the quality and unique characteristics of sparkling and still wines produced here.

Wine Tourism

International & UK context

- Globally, wine tourism is growing at annual rates of 5-10%. Wine tourism is a significant industry in markets with an established reputation for viticulture: 10m wine tourists travel to France each year,⁸ wine tourism generates more than \$20bn in revenue in the US⁹ and supports 36,000 jobs in South Africa¹⁰
- While wine tourism delivers footfall for vineyards, research from the US shows that wine tourists are also likely to engage with a range of experiences on a trip, not just those directly associated with viticulture (i.e. 85% likely to visit a historical or cultural attraction, 81% likely to go shopping and 60% likely to attend an event).¹¹ Hence, wine tourism has a vital role in attracting staying visitors who deliver value across an entire destination
- According to WineGB, wine tourism in the UK could be worth between £378–£658m by 2030.

Sussex Wine Tourism

- There is a significant opportunity to expand wine tourism in Sussex, with approximately a quarter of vineyards currently offering visitor experiences including cellar doors, tours/tastings, food and drink, and some with accommodation services
- There is considerable variance in the capacity and capability of the smaller vineyards which constitute most Sussex operators to offer visitor services versus the minority of large and established enterprises. Therefore, any plan to expand wine tourism will need to consider how 'scaling up' can be achieved in a way that is both ambitious yet realistic for vineyards of all sizes
- Survey data from 11 vineyards open to visitors in the South Downs National Park shows 'wine tourists' spend an average of £62 per visit, delivering more than five times the value of average visitor spend within the National Park¹²
- Applying the above data across the whole of Sussex estimates that wine tourism delivered £25.2m of economic impact in 2022¹³
- If Sussex maintains its current share of GB land under vine, by 2040 its share of the GB wine tourism market could be worth £168m.¹⁴

⁵ Statista: United Kingdom Wine Sales, 2022.

⁶ Sussex Wine Tourism Investment Implementation Plan 2022-2026, Technical Report, Matthews Associates.

⁷ Sussex Wine Tourism Investment Implementation Plan 2022-2026, Technical Report, Matthews Associates.

⁸ Wine Economic and Policy, Science Direct.

⁹ Mintel.

¹⁰ Economic Value of Wine Tourism in South Africa 2019, Vinpro.

¹¹ Wine Travel in the United States: A profile of wine travellers and wine tours, Roberta Garibaldi et al.

¹² Spend data from Vinescapes Vineyard Survey in SDNPA Viticulture Growth Impact Assessment vs. £12.31 average spend data from South Downs Visitor Survey 2018.

¹³ Sussex Wine Tourism Investment Implementation Plan 2022-2026, Technical Report, Matthews Associates.

¹⁴ Assumes GB wine production reaches 40 million bottles p.a. by 2040, that associated wine tourism spend in GB reaches £658m and Sussex maintains 25.5% share of GB. land under vine. Wine production and tourism spend figures via WineGB/WineIntelligence.

Policy Context

A range of policies in Sussex support the development of viticulture and wine tourism. Anticipated growth can, in turn, deliver socio-economic benefits for the whole county. We have highlighted the main policy drivers under the following headings: jobs and skills; development and planning and; sustainable transport.

Job creation and skills development

To grow at anticipated rates and deliver increased employment, Sussex vineyards will require more workers who can provide specialist technical knowledge to support increased production. Training and qualifications to produce a skilled workforce are paramount. Education providers such as Plumpton College have done much to promote careers in viticulture across a variety of course types (spanning apprenticeships and graduate degrees). The industry is working closely with Plumpton College to develop courses that meet the future needs of the wine sector and support long term career development.

A focus on upskilling is also being supported via the Sussex Chamber of Commerce, who are developing a Local Skills Improvement Plan (LSIP) — featuring agriculture and viticulture, as well as visitor and cultural industries as key sectors. The Department for Education is expected to announce LSIP roll out plans in summer 2023 and provide a basis for increased partnership working between industry and local education providers.

More recent labour market shortfalls have highlighted the need for the sector to attract workers more generally across all skill levels.

Development

Planning policy that seeks to protect the special character of rural Sussex and manage the environmental impact of viticulture is key to the sustainable growth of the county's wine industry and wine tourism. A supportive and consistent approach to planning across the county enables vineyards to grow their businesses through the development of production facilities and accommodation as well as diversify through retail, food and drink, and other visitor experiences. Policy supports business growth in a way that is sensitive to the particular characteristics and environmental needs of locations in which Sussex vineyards are situated, but smaller businesses in particular would likely benefit from a simple and accessible guide to planning. This may be achieved through the publication of a best practice toolkit, or through peer support where larger enterprises can share learning from successful developments.

Market Analysis

Previous research has highlighted target markets for Sussex among international audiences¹⁵ and UK domestic travellers.¹⁶ International priority markets are the USA, Germany, Canada, France and the Netherlands which also have a good fit with the Sussex offer. Using this insight, combined with an analysis of UK wine drinkers from Wine Intelligence, we have identified two ‘macro-segments’ for whom Sussex wine tourism is likely to have most resonance and which can be applied to both international and domestic visitors. These are people who are ‘wine interested’, rather than ‘connoisseurs’:

¹⁵ Blue Sail Sussex International Segmentation, June 2022.

¹⁶ Blue Sail Visitor Economy Vision & Medium Term Actions, August 2021.

Combining visitor segments with best fit wine drinker profiles identifies wine tourism targets for Sussex

Best prospect segments for Sussex:



UK Domestic Visitors



International Visitors



Wine Drinker Profile

Free & Easy Mini-Breakers

Younger, no kids, culture & events; want a wide range of activities

Buzzseekers

Millennial skew, love novel experiences, thrive on spontaneity & an action-filled offer. Hands-on learning appealing

Generation Treaters

Mainly millennials, frequent drinkers and highest spenders (sparkling). Open to experimenting and keen to learn

Country-Loving Traditionalists

Empty-nesters, local food & drink, cultural experiences

Explorers

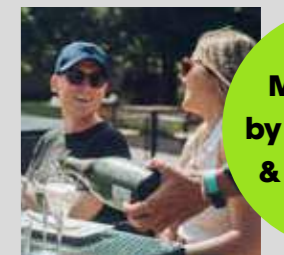
Middle-aged, nature lovers who embrace local culture (incl. food & drink)

Adventurous Explorers

Middle-aged+, confident wine drinkers, wine is important and they enjoy discovering new wines

Prospect wine tourist target markets

(Overlay of Visitor Profile + Drinker Profile)



Motivated by Dynamism & Discovery

Primarily millennials, always searching for the new, experience of wine is via sparkling varieties, and will spend on novel experiences



Motivated by Enrichment & Exploration

Middle-aged, love nature and the landscape, knowledge of wine, want to encounter a destination at a relaxed pace and enjoy new food and wine experiences

Source: VisitEngland

Source: VisitBritain

Source: Wine Intelligence (UK Portraits)

These two target markets stand out as being distinct and relevant for Sussex given their open-mindedness and an appetite for new experiences which underpin their attitudes to travel and wine (exhibited as a desire to savour an experience in those looking for enrichment and exploration, and a quest for novelty among those motivated by dynamism and discovery). Open-mindedness is likely to be a key characteristic of prospect segments who are attracted to Sussex via wine tourism, particularly as English wine can still be considered as ‘new’ versus more established international wine experiences.

Prospect visitors motivated by exploration and enrichment want to expand their knowledge of wine. Experiences that enable them to develop a degree of ‘expertise’ are likely to be attractive. As younger drinkers, prospect visitors looking for discovery and dynamism are most likely to enter the wine market via sparkling varieties. These visitors will seek experiences that broaden their horizons of wine while being hands-on and ‘instagrammable’. Both segments are visitors with a desire to explore across a destination — offering opportunities for extended stays and associated value. This has implications for both accommodation and transport given that staying visits offer a significant value opportunity for Sussex.

Other wine tourism research shows that the wider visitor offer is vital to building a reputation as an internationally successful wine region. Landscape, heritage, culture and events are assets which Sussex has in abundance and which play a role in framing the experience of wine tourism as part of an overall Sussex ‘vinescape’ experience.

A summary of the likely most appealing vineyard and wider destination activities for each target segment is shown here:

Summary of target market motivations and appealing experiences



Dynamism & Discovery

Who?

Primarily millennials, always searching for the new, experience of wine is via sparkling varieties, and will spend on novel experiences. Attracted via Brighton

Wine consumption:

Sparkling



Motivation for wine tourism:

Broaden (wine) horizons

Examples of appealing vineyard experiences:

Harvesting workshops, behind the scenes tours, arriving via active travel

Appealing activities across the destination:

Premium dining, visiting iconic landscapes/coast, active cycling/sports, hands-on learning



Enrichment & Exploration

Who?

Middle-aged visitors, love nature and the landscape, has knowledge of wine, wants to encounter a destination at a relaxed pace and enjoy new food and wine experiences. Attracted via East & West Sussex

Wine consumption:

Range of varieties



Motivation for wine tourism:

Expand knowledge, develop wine ‘expertise’

Examples of appealing vineyard experiences:

Tasting new blends, participating in blending sessions, food pairing

Appealing activities across the destination:

Visiting iconic landscapes/coast, heritage sites, parks & gardens, cycling & walking

Reaching International Markets

Latest research from VisitBritain reveals that Britain is a priority destination for international visitors, particularly among long-haul markets. Britain is perceived as having an attractive combination of history and modernity; and is seen as destination that is relatively easy to navigate due to its compact geography. These are strengths that are mirrored within the Sussex experience.

Furthermore, sustainability is emerging as an important driver for travel decisions, particularly among younger visitors like those in our ‘Dynamism & Discovery’ segment. People’s desire to be responsible tourists will increase as awareness of sustainable behaviour and associated benefits grow. Due to its sustainability credentials, Sussex is well placed to attract visitors looking to engage in responsible tourism. As a destination that has a compelling all-year-round offer, Sussex can attract visitors in search of new and different experiences that support responsible tourism.

Engagement with the travel trade — especially for lucrative long-haul markets — will remain important in the medium-term to keep Britain and Sussex top-of-mind and in a strong position to convert potential demand into visits in an environment where inbound visitor volumes and value are expected to remain below 2019 levels into at least 2025.

Profile and Positioning

Building the county’s reputation and profile as an area producing quality wines will be the first task in establishing Sussex as a destination for wine tourism. There are two factors at play here. Although English wine’s reputation is growing, there is still some scepticism about its quality and the ‘terroir’ among international visitors (especially in France and Australia). Additionally, low awareness of Sussex as a wine producer is also an issue. Therefore, demonstrating the quality credentials of Sussex wine and driving awareness of its vineyards will be vital.

In terms of positioning Sussex as a wine tourism destination, there are several activities that are likely to positively influence prospective visitors. These include highlighting sustainable practices, putting wine in the context of the county’s high-quality and values-driven food and drink supply chain, showcasing the broader landscape, heritage and cultural experiences, and demonstrating the positive impact of wine tourism for local people and the economy. The Sussex wine tourism narrative must work in the context of the overall destination narrative that is currently in development.

Market Trends

We have observed the emergence of five key trends that are influencing people's travel choices. Sussex is well positioned to capitalise upon visitors' desire for authenticity, willingness to embrace the outdoors and increasing consciousness around sustainability:

The Pursuit of Real — people investing in experiences over material possessions. The possibility of being immersed in a destination's authentic experience is what attracts visitors

Fresh Adventures — embracing the outdoors. People want activities to support their wellbeing, but that don't cost the earth (in more ways than one)

Going Digital — digital connectivity is vital for planning and booking as well as 'documenting' a trip via social media. Wi-Fi and mobile coverage are becoming hygiene factors

All About Value — with disposable incomes being squeezed, visitors need to justify their investment in a trip — but value matters more than price

Journey to Net Zero — tourism contributes to carbon emissions. People recognise the need to reduce impacts, but sustained and consistent changes are not yet 'mainstream'. This is an opportunity for Sussex to show leadership given its strong environmental credentials in which viticulture plays a key role





Thank you

Get in touch

sussexmodern.org.uk/sussexwinetourism

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