

Wealden Viticulture Feasibility Study

Final Report



Prepared by
Planning Solutions Consulting Limited

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Executive Summary

Wine continues to be one of the fastest-growing agricultural products in the UK. Over the last 10 years, the number of acres planted with grapevines in England and Wales has grown by 135% according to the English Wine Producers trade body. Annual sales of wine made from grapes grown in England and Wales now stands at over £100m; production is set to grow to over 5 million bottles over the next year. The favourable climate together with the gentle slopes of the South Downs and High Weald have led to Sussex becoming one of the UK's largest wine producing regions. Wealden District has over 148 hectares (355 acres) under vine. The Wine Standards Board 2016 report lists 26 vineyards, 24 vineyard owners and 5 wineries in Wealden although the sector is dominated by two wine estates – Rathfinny and Bluebell – who between them own two thirds of the planted area.

Discussions with the wine producers in the area confirmed local and projected growth. The sector appears to be performing well with more than 90% of vineyards expecting growth over the next 3-5 years. There are concerns relating to barriers to growth mainly in respect of sourcing labour, the impact of Brexit and strict planning considerations. However, significant investment continues to be made in developing wine tourism, particularly wine trails, tastings, tours and some accommodation provision. There is strong commitment and enthusiasm for further industry collaboration.

Wealden's tourism sector is currently performing well compared to other districts in East Sussex, although there has been a reduction in day visitors compared to 2014. It is the second most important contributor to the East Sussex visitor economy, after Eastbourne, in terms of total business turnover and the number of jobs it supports. More than 50% of staying visitors come from within SE Region (of which 22% from London). Given the environmental and landscape sensitivities (particularly with regard to Ashdown Forest) the emphasis is on growing tourism value (and yield) rather than volume. The research, analysis and assessment suggest that wine-related tourism is an emerging product that has the potential to contribute to strengthening the region as a tourism destination which appeals to a variety of market segments.

A wide range of stakeholders were consulted as part of the study, including local authorities, Plumpton College and the private sector. From the consultation, there is a notable level of commitment to grow and develop wine tourism and we perceive significant momentum in taking forward initiatives to make a positive contribution to its future development as an important regional attractor.

The viticulture sector in Wealden is relatively small and is in its infancy. There are clearly differences in the scale and scope of wine production and wine tourism when compared to wine based destinations around the world, e.g. over 100 commercially provided tours are available on the Margaret River destination website. However, there are a couple of core factors which are apparent in the majority of regions which are successfully developing wine tourism. The authorities in the regions have recognised the relations and synergies between **food and wine** and have integrated food and wine as part of its overall marketing and positioning. This is supported by **proactive and responsive structures** to drive forward destination and campaign activity.

A key consideration is the geographical focus for any future Action Plan for wine tourism. The general consensus from industry is that any future programme will probably need to be branded as Sussex-wide (scale and breath of opportunity) but ensuring that there is a specific focus on supporting the growing viticulture sector in Wealden.

The vision is for Sussex, including the Weald, to be recognised as a quality destination for premier food and wine products and experiences in both domestic and international market. The focus of activities is on:

- **Building awareness:** High-profile events run and attended by the wine industry offer opportunities to build awareness to wine tourism amongst high yield visitors.
- **Building the capability of the sector:** A support infrastructure to encourage collaboration and to find ways to forge a united approach for greater impact and mutual benefit.
- **Building the market:** Develop quality packages and itineraries to cater to short break market and multi-day destination markets.

The Action Plan focuses on 3-related initiatives:

Local Wine Cluster

Any future initiatives to develop and grow wine tourism will need to involve and be driven by representatives from the viticulture sector. The research and discussions with businesses demonstrated a strong desire to find new and better ways of partnership and collaboration to achieve mutually beneficial outcomes. It would seem appropriate to build and develop the private sector capacity of the local Wealden wine 'cluster' to improve coordination and marketing and share best practice in growing and promoting the local wine tourism product. It is likely that Wealden District Council will need to take an initial lead-role in supporting the development of the group.

Key early actions include:

- Review the current membership / activities of the local wine group;
- Facilitate a meeting of the group to consider future terms of reference and resource requirements (Plumpton College has expressed an interest in being involved);
- Develop an outline Action Plan prioritising activities for the next 12 – 24 months;
- Assist develop a wine cluster proposition to East Sussex County Council / Locate East Sussex regarding future resourcing and pilot marketing programmes;
- Draft revised terms of reference;
- Consider re-launching the group during English Wine Week.

Bookable Packages

Wine related tourism has been shown to grow local economies in many wine regions of the world. The most successful regions make it easy for wine tourists to book vineyard tours, including accommodation, in advance of their visits. Visitors are already attracted to the Wealden area through a range of cultural destinations and sightseeing highlights. The vineyard sector can build on this by targeting high spending visitors from London, SE England and the local area who are interested in wine. Key actions include:

- Promote wine related bookable activities, day trips and overnight stays in Wealden.
- Make booking as easy as possible.
- Involve existing private sector wine tour operators, vineyard clusters + stakeholders such as the English Wine Centre and Plumpton College and accommodation providers.
- Use best practice from other wine areas and countries

It is likely that the cluster group will take a lead role in driving this programme forward and progressing future promotional activities.

Wealden Wine Festival

Most renowned wine areas in the World play host to some form of annual festival to celebrate and promote their product and place of origin. Wine events and festivals are becoming popular worldwide and are recognised as a regular feature of wine tourism experiences held to celebrate winemaking and wine culture. The principal purpose of the wine festival is to increase wine sales for producers but it is also seen as an important component of the marketing mix to enhance market awareness of the wine 'region'. Other objectives include:

- Add to the tourism offer in the region
- Promote wine produce
- Show local wines can compete with World renowned brands
- Offer strong appeal to staying visitors

Key actions include:

- Secure input and ownership from the local wine cluster to the concept of a Wealden Wine Festival, including the style of the event (s).
- Consider piloting a series of Wealden-wine events during English Wine week working in association with the new industry body Wines GB, e.g. Wealden Wine Academy etc.
- Collaborate with the new owners of the English Wine Centre to look at opportunities to re-introduce an annual event at that operation and also to work closely with Plumpton College as a key partner in delivering the event

Summary comments

All the projects require a reputable and trusted coordinator to manage and steer the initiatives forward. Wealden District Council can share its knowledge of key stakeholders and contacts within the area and (subject to agreement / available resources) provide a valuable role in all three models acting as the client and co-ordinator for the project. Initially, the District Council's Tourism team will need to lead on the development of the programme.

Immediate next steps to consider are:

- Cluster networking coordination, including Secretariat support particularly for small scale producers

- Liaison with new trade body Wine GB and Sussex Wineries
- Web based support for the sector / event
- Potential access to support funding if available, e.g. Locate East Sussex, East Sussex County Council

The core activity will be to formalise the local Wealden wine cluster group and facilitate its development as an industry-led organisation, which can drive forward plans for the sector. Some initial pump-priming resource will be required (staff time and financial support) to support the group as well as funding some early-win initiatives. It will be important to understand and engage with Sussex Wineries to avoid duplication and ensure regional collaboration.

1. Introduction

1.1 Background

In 2016, Wealden District Council commissioned tourism consultants to undertake both visitor and business research to help inform the Council's future plans for tourism. As wine tourism is a growth market both domestically and internationally, one of the report's recommendations was for the Council to consider undertaking a feasibility study on whether an International English Wine Festival could be a viable option for the Council to be involved with. The proposed opportunity is for the Council to support an international festival that embraces all English wines and that targets the growing national and international wine tourism market.

Following this study and recommendation, the Council decided to broaden the scope of the international wine festival proposal to consider how to grow and develop the viticulture sector, specifically the feasibility of developing wine tourism to grow the visitor economy. Planning Solutions Consulting was appointed to undertake this study.

1.2 Aims and Objectives

The aims of the work are twofold:

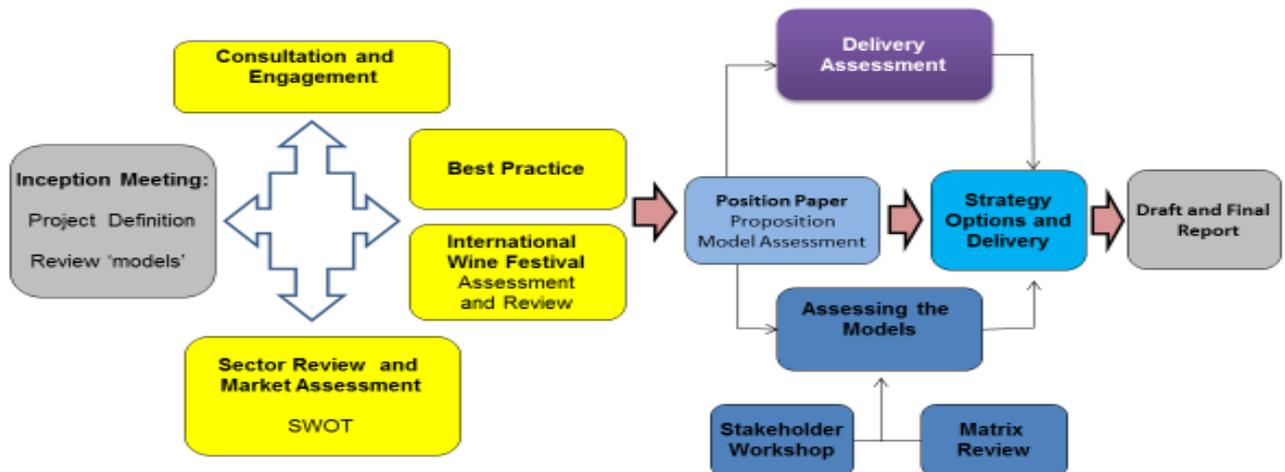
- To carry out independent research and assessment to explore how the Council can support the viticulture sector within the district, and
- Using this research, to assess and develop practical models to support the growth and development of the sector.

The emphasis of the commission has been to consider and assess a number of models, which can be developed and packaged to attract a high yield visitor market, tested against a number of desired outcomes:

- Putting Wealden on the Map
- Driving high value visitors
- Driving high value jobs
- Building and adding value to existing product
- Attracting investment
- Increasing local pride
- Benefitting whole District

1.3 Approach

Our approach has focused on a number of phases, which is set out in the diagram below:



1.4 Report Structure

Following an Interim Report presentation to the Client Team and Industry Workshop (held at the English Wine Centre on 30th January 2018, the final report is structured as follows:

- Section 2 sets the context for the sector outlining the growth and development of viticulture in England;
- Section 3 looks at the viticulture sector in Wealden, including the outcome of primary research to assess current growth and developments within the district;
- Section 4 reviews the tourism sector in Wealden and the demographic profile of the core market;
- Section 5 summarises the outcome of our programme of consultations;
- Section 6 provides key lessons from our review of Good Practice in wine tourism;
- Section 7 outlines a SWOT analysis of the viticulture sector;

- Section 8 sets out a proposed vision and set of priority objectives to develop wine tourism in Wealden;
- Section 9 sets out an Action Plan of priority interventions and
- Section 10 considers the potential role of Wealden District Council and future next steps.

2. Viticulture and the Wine Sector

2.1 Report Structure

Wine continues to be one of the fastest-growing agricultural products in the UK. Over the last 10 years, the number of acres planted with grapevines in England and Wales has grown by 135% according to the English Wine Producers trade body.

Global warming has been credited with providing a later English growing season and making the industry viable across Kent, the east of England and as far west as Wales. The increasing age of vines and improving technology are other key factors. Sophisticated meters that determine grape sugar levels allow growers to determine the best picking period in what can be a few brief days to harvest the crop. More precise meteorological forecasts have also helped the English to cope with one of the world's most changeable weather systems.

Latest research estimates over 700 individual vineyards in the British Isles¹ ranging from extremely small ones (the smallest only has six vines) to ones of almost 90 hectares (222 acres). Together they total around 2,000 hectares (4,942 acres). There are an estimated 1m new vines being planted in England during 2017.

Some of the larger wine producers have multiple vineyards; Nyetimber being the largest with seven separate sites covering 171 hectares (423 acres). Other large producers include Gusbourne 93 hectares (230 acres), Denbies 90 hectares (222 acres), and Chapel Down 78 hectares (192 acres). Many of the larger producers - Chapel Down, Ridgeview, Camel Valley and others - also buy grapes from vineyards which are usually under long-term contract to them or with which they have grape supply agreements.

The Wine Standards Board of the Food Standards Agency lists 2,077 hectares of vineyards over 0.1 hectares (0.25 acres) in size for 2016. The South East of England accounts for 54% of the planted area.

English wines are enjoying a renaissance at the moment. Annual sales of wine made from grapes grown in England and Wales now stand at over £100m. According to the latest data from Funding Options, an online aggregator for SME finance based in the UK, the turnover of the English wine sector has nearly trebled over the last five years from £55.7 million in 2011 to £132 million in 2016.

¹ Stephen Skelton, UK Vineyards Guide

The same 2016 figures show 502 vineyards of more than 0.1 hectares in England and 135 wineries. Production is estimated to be around 4.5 million bottles in 2017. This is slightly higher than the current 5-year average of 4.2 million bottles.

Classic sparkling wine varieties account for 60% of plantings. The top three grape varieties are Chardonnay, Pinot Noir and Bacchus.

In the last 16 years English sparkling wines have won 14 international sparkling wine trophies – no other country has achieved this. This year is also predicted to be a vintage year for English and Welsh sparkling wine, helping grow the industry further.

Global wine production is dominated by a handful of countries: France, Italy, Spain and the US produced 58% of all wine in the period 2000 to 2013. The UK is a small player by comparison, producing only 1.3 million tonnes on average per year between 2000 and 2013, although as identified earlier, this figure is set to rise substantially.

Although the total amount of wine consumed in the UK has increased in recent decades, the vast majority is produced abroad. In 2015, 12.8 million hectolitres of wine were consumed in the UK in total, but only 18,000 hectolitres or 0.1% of this was produced in the UK.

A major concern expressed by producers is the amount of tax levied on wine production, as set out in the table below:

Rates per bottle from 13 March 2017 (excluding VAT @ 20%)

Wine	£2.16 per 75cl
Sparkling Wine Exceeding 5.5% but not exceeding 8.5% abv	£2.10 per 75cl
Sparkling Wine Exceeding 8.5% but not exceeding 15% abv	£2.77 per 75cl
Fortified Wines	£2.89 per 75cl

There are concerns about future growth potential due to the high tax duty, specifically the high duty on sparkling wine.

3. Viticulture in Wealden

3.1 Introduction

Sussex has 650 hectares (1,560 acres) under vine (just under 30% of the UK total) and the favourable climate together with gentle slopes of the South Downs and High Weald have led to it becoming the UK's largest wine producing region ahead of Kent and Hampshire.

East Sussex has 290 hectares (696 acres) of vineyards. The county is home to Plumpton Agricultural College, an internationally recognised centre of excellence in viticulture education and research. East Sussex also produces some fine local foods, which together with the wine industry, offer the potential for East Sussex growing its reputation as a destination for 'gastro-tourism'.

Wealden District council has 148 hectares (355 acres) under vine. The Wine Standards Board 2016 report lists 26 vineyards, 24 vineyard owners and 5 wineries in the Wealden District council area (Appendix 1). The vineyard scene is dominated by two wine estates – Rathfinny and Bluebell – who between them own two thirds of the planted area.

Rathfinny is a relatively new wine estate (2010), with ambitions to be the largest single estate in the UK. They have invested in land for future plantings, a tasting room, a shop, event space, vineyard tours and a new winery with a capacity a 1m bottles a year. Visitor numbers are already exceeding 40,000 people. They are also driving the application process for a Sussex specific PDO. Bluebell is a popular wine estate with a tasting room, blending workshops and shop.

Davenport Vineyards, Sussex Vineyards, Hidden Spring and Busi-Jacobsohn lead the rest of the pack and all have more than 5ha of vineyards. The recently planted Clayton Organic Farm vineyards near Mayfield will join them in this category when production starts in 2020. The English Wine Centre, a tasting room, retail space and online store dedicated to English Wines, is situated within Wealden. The centre also has high quality event spaces, function rooms, a restaurant and accommodation.

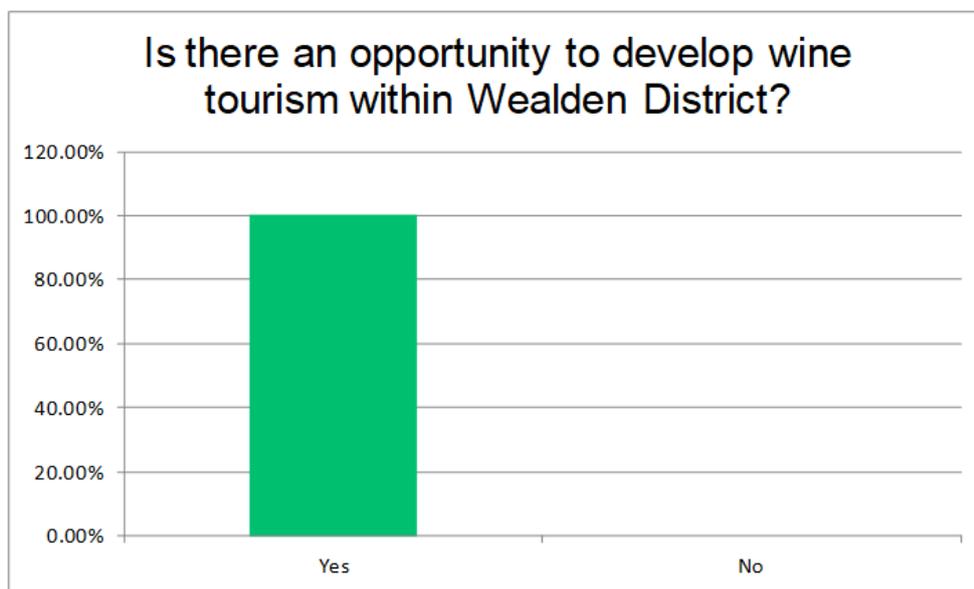
Wealden also has eight micro-breweries. There are more than 120 pubs, situated in towns, village and rural locations. Many of the pubs offer food and accommodation. There are 40 farm shops selling local produce including Wealden produced wine, cider, cheese and meat. There are also some high-quality award-winning restaurants and gastro-pubs in the area. Over the past three years the Council has supported local producers by delivering a successful Food and Wine festival which reached over 7,000 visitors in 2016.

3.2 Research programme

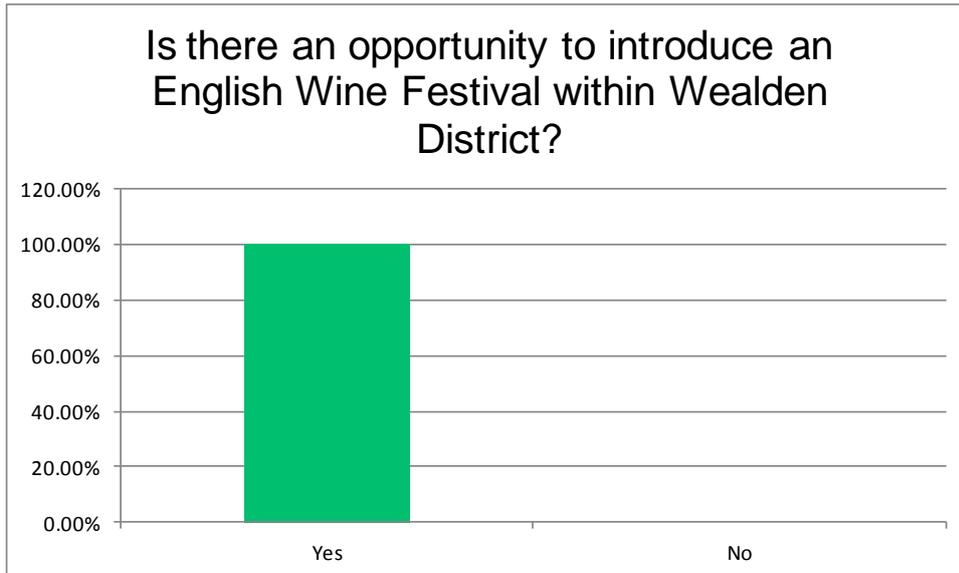
Sector survey among wine producers in Wealden

As part of our research we have consulted with wine producers in the district, generating 14 responses. In terms of the surveyed, there is undoubtedly a relatively buoyant and growing sector with a strong degree of optimism for the future growth of the wine sector in Wealden and wider areas.

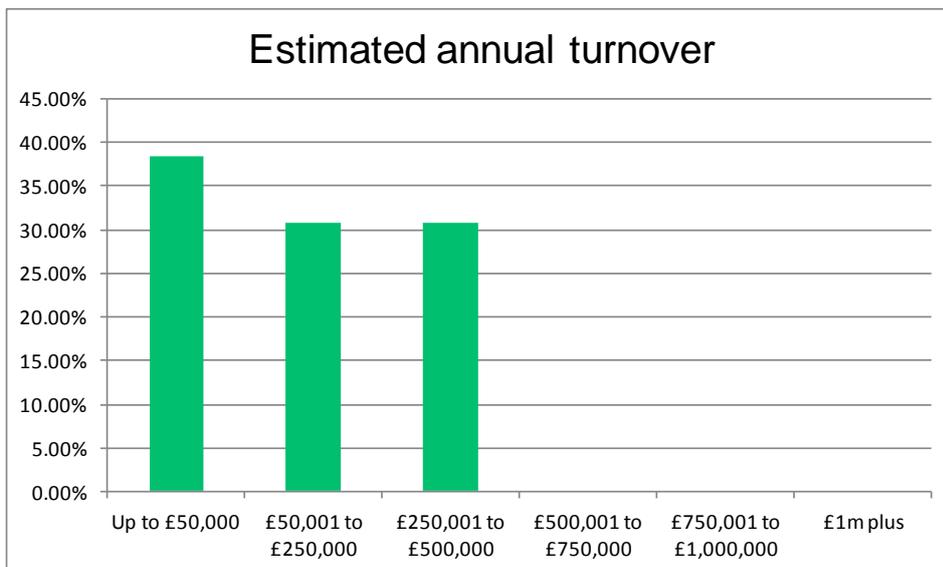
The response as to whether there is an opportunity to develop wine tourism within Wealden District generated a positive response from all vineyards / producers.



Similarly the survey elicited unanimous support from the sector in terms of backing for an English Wine Festival staged in the district.



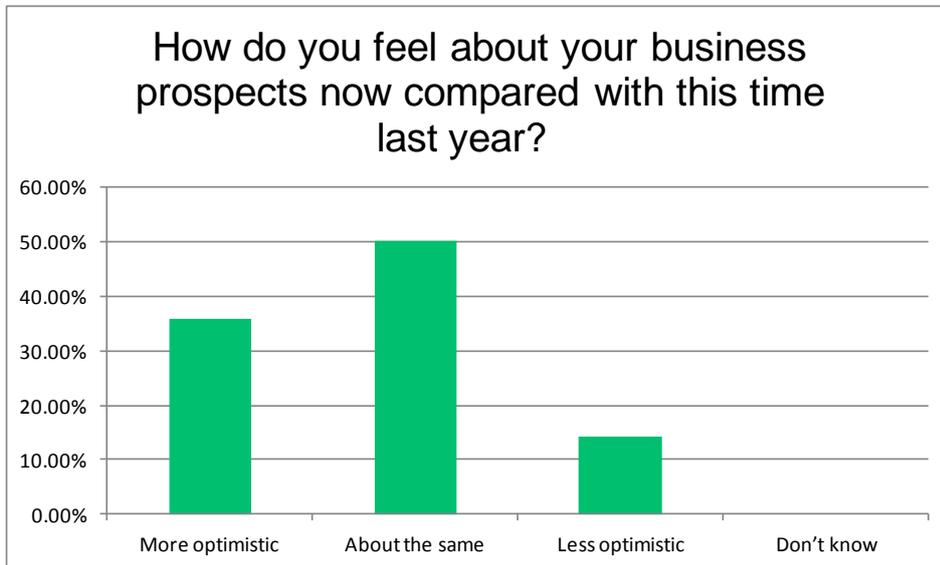
As expected with a relatively young industry in the region with a range of recent new entrants most have a turnover below £250,000. The scale of operations does vary as 30% are larger with between £250,000 and £500,000 annual income although none currently exceed this level.



Some of the respondents are wine producers, others combine wine production with grape and other fruit produce. A number are artisan enterprises with a focus on organic produce. In terms of the level of visits at present this is mainly low key activities. The throughput ranges from a few dozen to some 41,000 at one establishment.

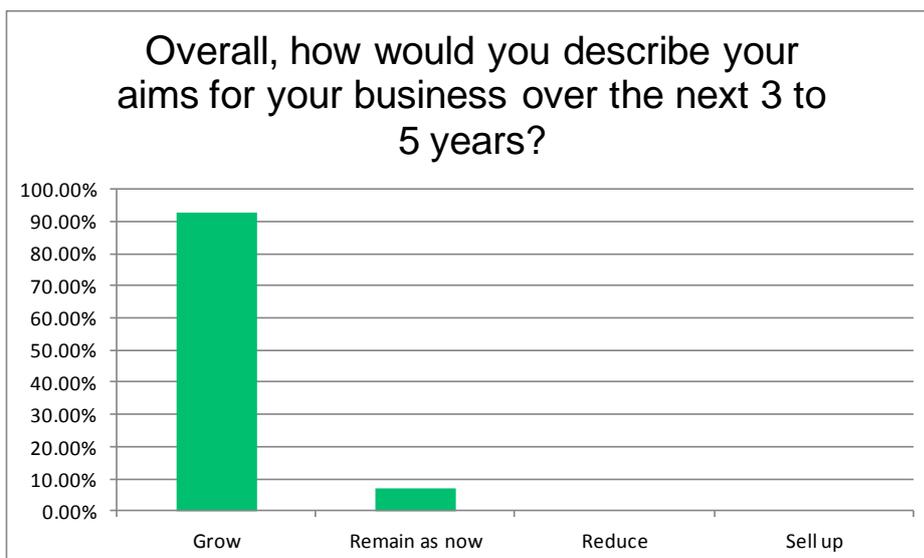
Prospects

The sector appears to be performing well. While half have remained stable year on year over the past 12 months, more than a third are more optimistic than a year ago and only 14% are less optimistic.



"We are part of a burgeoning wine growing sector and there is optimism across the whole sector."

Sector expectations and goals demonstrate a strong positive trend with more than 90% of vineyards expecting growth over the next 3 to 5 years. The remainder expect to retain their current level of activity and none are expecting any reduction.

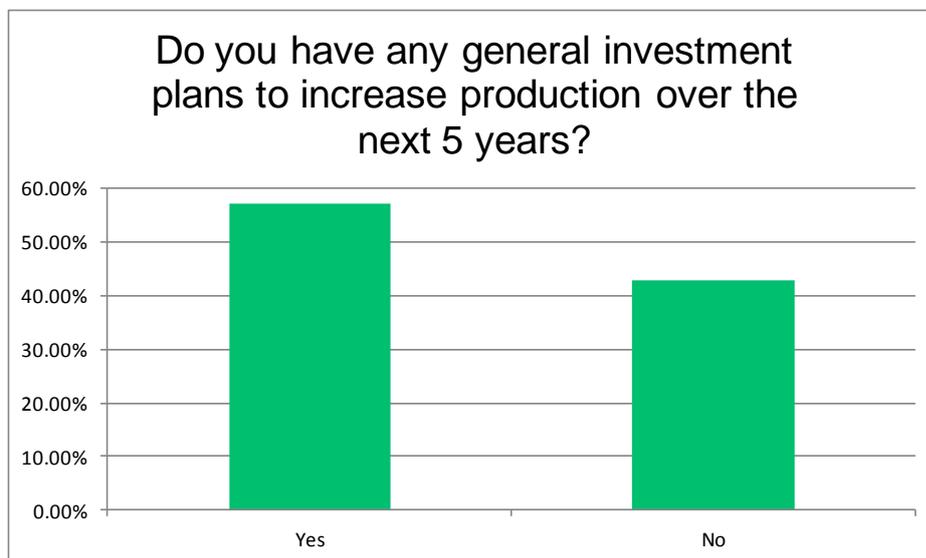


The growth plans include new wineries, retail units and direct sales channels as visitors are seen as another sales channel for wine as well as the visitor experience.

There are some concerns relating to barriers to growth mainly in respect of sourcing labour, the impact of Brexit and the strength of the pound in the currency markets (which has led to higher input costs). Some vineyards are also difficult for visitors to access physically and one respondent was keen not to divert attention away from wine production as the main focus of the business.

Investment

In terms of investment plans, close to 60% have planned investment aimed at increased production in the next 5 years.



Wine Tourism

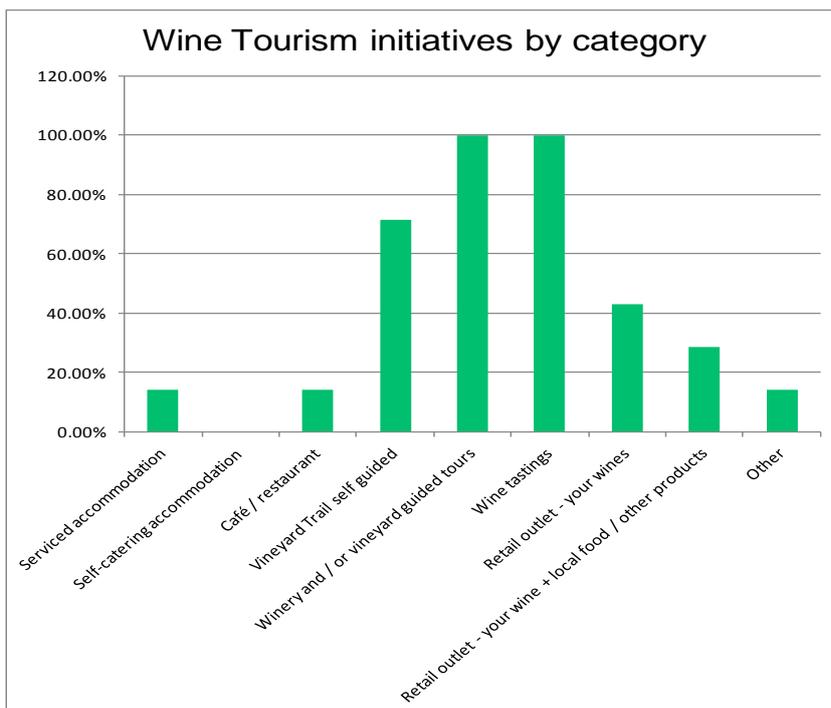
As mentioned the sector is still relatively 'young' in the area and as such it is not surprising that the initial main focus is on production rather than developing wine tourism experiences. Nevertheless a half of all respondents have now invested in some way into the wine tourism sector.



Of those that have invested in wine tourism initiatives, they have prioritised vineyard guided tours as well as wine tastings. A significant proportion have also introduced self guided vineyard trails.

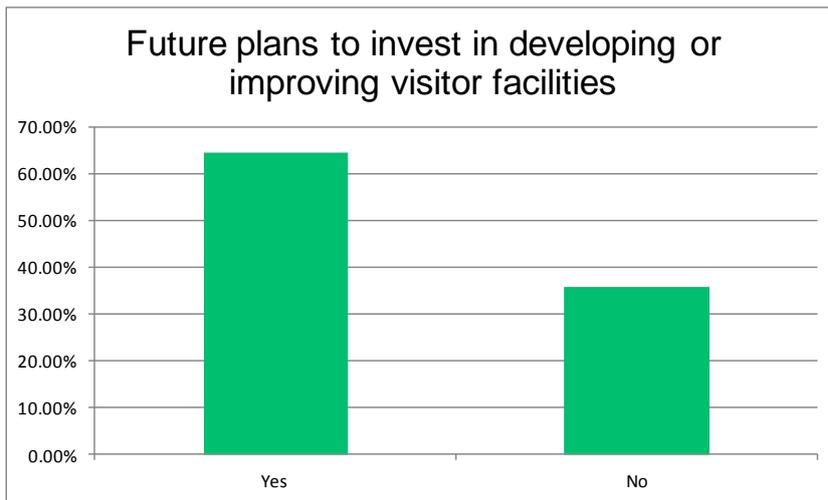
“We have additional vineyard plantings planned, a new winery building planned and we are looking to grow our hospitality offering' wine producer.”

Retail outlets have been established by approximately 40% (of those who have taken forward wine tourism initiatives – ie c.20% of whole sample). However catering and accommodation are only available at one vineyard operation currently.

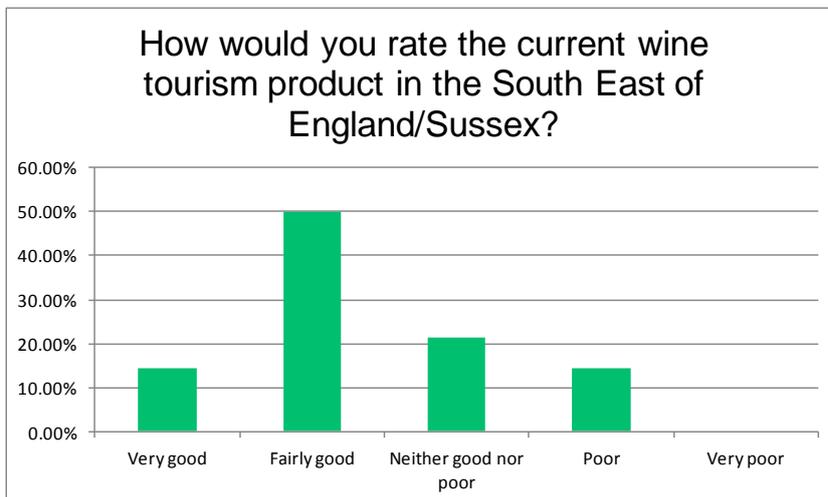


The majority of vineyards (more than 60%) already have future plans to invest in visitor facilities.

"We have recently started to run tours at the vineyard and have a dedicated tasting room for guests to relax in afterwards. We may expand this by offering light refreshments next summer."



The wine tourism product is broadly considered to be of a good standard, it is acknowledged however that the wine tourism product is still under-developed.



Obstacles

The main obstacles are seen as the strict planning regime, notably in respect of any potential impact on volumes of visitors through or in Ashdown Forest. The availability of casual labour supply is a real concern for many and others also highlight the reliance of the sector on good weather conditions for favourable yields. It is acknowledged that

developing other income streams apart from wine sales can help to generate income even at times when the crop is affected by poor growing conditions.

Duty on wine and export tariffs are also restricting market growth potential. Also many vineyards have difficult access often along narrow lanes and with poor or no public transport links. This makes it hard to build a viable tourism product in these locations. The difficulty in obtaining appropriate tourism signage (including white and brown) is seen by some as a barrier to growth. Some also state that they are hesitant as there are a number of others moving ahead in the wine tourism marketplace and competition may become tougher.

The investment cost, marketing costs, the employment rates and the uncertain market conditions are also referred to as reasons for not taking plans forward immediately. There is a perceived need to invest in the marketing and promotion of Wealden as an area for outstanding wine as well as outstanding natural beauty.

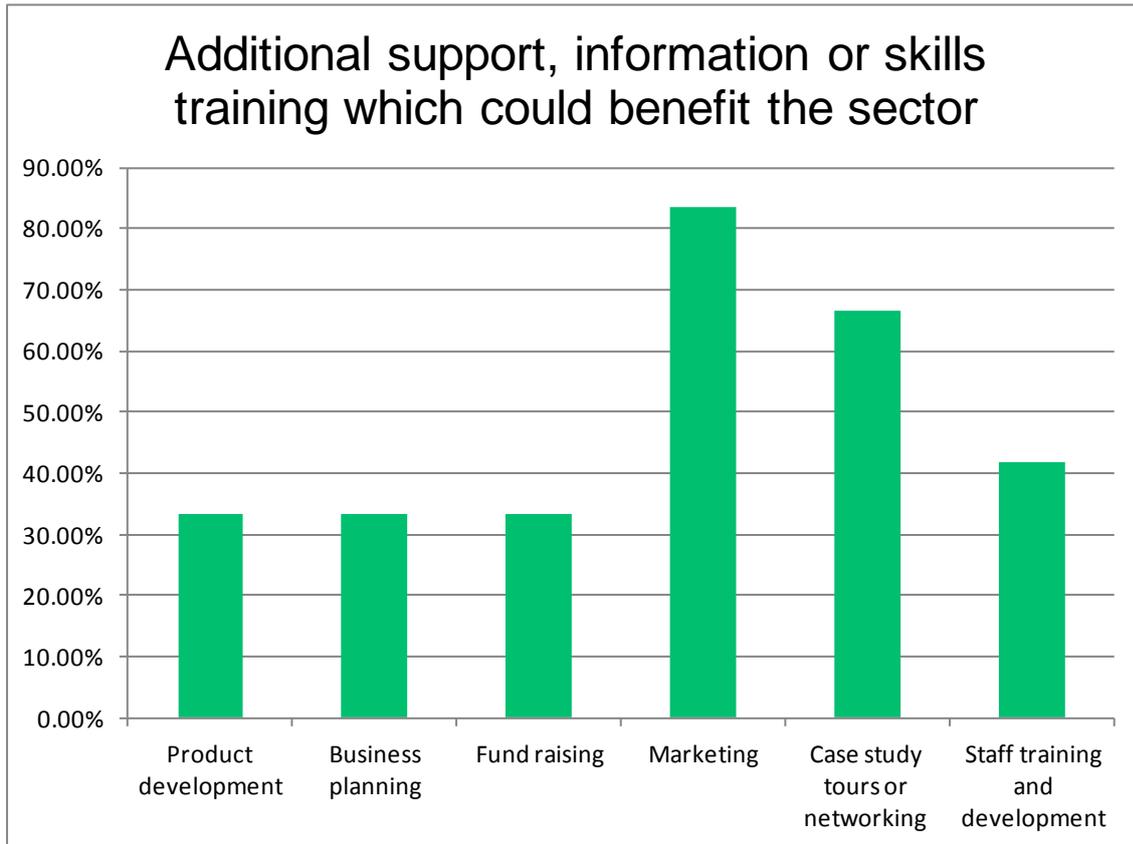
Others highlight the need to make sure the tourism needs are fully balanced with the needs of the AONB.

Sector support

The main area of support requested is for greater collaboration between the planning department working in conjunction with the tourism development department

Others acknowledge that support is needed for marketing and advertising and additional sector networking opportunities to share best practice and consider collaborative initiatives

"Just getting us all together to encourage collaboration would be a great start."



Knowledge of who to approach for funding, mentoring to grow the business at different stages and information on investment support grants would all be welcome.

Examples

I think wine tourism initiatives that work best promote a range of cultural values so the best of a country's food, countryside, music, art etc as well as its wines.

There are many examples from around the World give inspiration. Places quoted include Tasmania and Oregon Napa Valley, Hunter Valley. which are seen as overseas wine regions which have excellent offerings. Also in South Africa and in New Zealand there are fantastic opportunities to explore small wineries on tours, usually with a lunch stop at one of the larger establishments. Stellenbosch and Margaret River gained several positive references.

Many UK vineyards are considered to have very high quality tourism facilities. Those mentioned include Chapel Down, Ridgeview and Nyetimber.

Other comments

A few mentioned that business support would be welcomed in this early period of its development

Others also point out that many small vineyards struggle to get their name out in the market place and cannot afford significant marketing budgets.

It is also important to acknowledge that some respondents feel that Wifi and fast internet connectivity is vital for the future growth of small and farming business in Wealden.

4. Tourism in Wealden

4.1 Key characteristics

Wealden lies within the 'Weald' and covers 323 square miles of rural East Sussex yet is close to larger towns and cities such as Brighton, Eastbourne, Tunbridge Wells and Lewes. Within the District are five market towns (Crowborough, Hailsham, Heathfield, Polegate and Uckfield) and many historic villages, pubs, festivals and events.

The area is easily reached from London by car in just over one hour and just over 90 minutes by train. It is also ideally situated for both Gatwick and Heathrow airports. The ferry port at Newhaven (providing a 4-hour crossing, three times a day direct link with Dieppe) is under one hour and Eurotunnel and Eurostar (Ashford International) is just over the hour.

Wealden's core appeal to visitors is its beautiful, varied and unspoilt landscapes and views. It has undeveloped coastal cliffs, beaches and countryside that varies from ancient woodland, forests and heathland to a patchwork of medieval fields, parklands and open rolling downs. The quality of landscape is well-conserved with two thirds being protected as part of the South Downs National Park, Sussex Heritage Coast and High Weald Area of Outstanding Natural Beauty.

There are also a number of European and Internationally recognised special sites of ecological value that contribute to the special environmental attributes of Wealden including Ashdown Forest (which contains one of the largest single continuous blocks of lowland heath in south-east England) and Pevensy Levels (Ramsar designated wetland habitat).

Given the environmental sensitivities of the area, the objective for tourism is therefore to increase the value to the visitor economy by increasing the number of staying visitors and increasing visitor spend whilst minimising the number of trips taken.

Wealden's visitor accommodation is primarily non-serviced with a strong camping offer. In total there are more than 250 businesses offering overnight accommodation for visitors of which two thirds are self-catering units (46%) or camping, caravanning or glamping sites (20%). This sector offers some interesting and unusual accommodation including wild camping, glamping, shepherds huts, tree houses and large group camping.

By comparison, the serviced sector is considerably smaller, both in volume and the size of properties. There are more than 50 B&B's and relatively few hotels but these are mainly of

high quality for example, Ashdown Park Hotel, Buxted Park, Horsted Place, East Sussex National and Deans Place.

4.2 Tourism Sector Performance

Wealden’s tourism sector is currently performing well compared to other districts in East Sussex, although there has been a reduction in day visitors compared to 2014. It is the second most important contributor to the East Sussex visitor economy, after Eastbourne, in terms of total business turnover and the number of jobs it supports. More than 50% of staying visitors come from within SE Region (of which 22% from London).

	2015	2014
Staying Trips	469,000	up 2.7%
	1.7m total visitor nights	up 2.9%
Day Trips	5.3m	down 5.3%
Total direct tourism expenditure	£242.3m	down 1.9%
FTE jobs	4,923	

4.3 The Market

The national tourism market

Tourism is recognised as an engine of growth for the UK economy and supports some 2.6 million jobs (source: VisitEngland). At a national level, the latest research shows an improving domestic tourism outlook – particularly with the recent decline in value of the Pound and an increase in the number of high profile terrorism incidents overseas.

VisitEngland announced a record-breaking spend in 2015 in England at £14.4 billion for the amount spent on overnight domestic holiday trips in England. There have been some fluctuations but UK tourism has shown itself to be resilient in the economic downturn, particularly in terms of short stay domestic holiday trips in England. The 'staycation' trend of more domestic holidays has extended more than 10 years and levels of holiday-taking remain higher than pre-recession. Even though overseas trips have also now seen some return to growth (and this market also offers growth potential for wine tourism), the staycation projection is still strong and the main growth areas include rural trips. The trend

towards more short breaks continues as people are taking multiple breaks (sometimes referred to as 'holiday snacking') in addition to main holidays.

The local market

We have assessed the drivetime catchment population from the intersection of the A27/A22 trunk roads and based on the one hour and two hour contours. The two hours represents the core target market for short break holidays. There is a total population of over 6 million within one hour of this intersection and nearly 16 million within two hours as shown in the table below:

Drive Times (Minutes)	Households	Headline population
0 to 60	742,906	1,724,288
61 to 120	5,672,698	14,009,870
Total	6,415,604	15,734,158

Source: GeoPlan

The total catchment within 2 hours in excess of 15.5 million residents is a substantial target catchment and extends across large parts of South East England and includes parts of London.



Source: Geoplan. The drivetime data is based upon a look up table which covers drivetime from postcode sector to sector. It is worked out based on the centre points of postcode sectors and so if more than 50% of the postcode sector is included, this is incorporated into the figures. In some cases this can lead to data which does not precisely follow the drivetime boundaries. The original source of population is based on the 2001 census data and figures have been updated. The population is therefore a projected figure.

Age breakdown

There is a slightly higher predominance in the under 45 and particularly over 65s although this is not the case within the overall two hour catchment where there is a predominance of those aged 25-44.

Age	Market					
	0 - 60 minute			0 to 120 minute		
	Area total	Area %	Index	Area total	Area %	Index
Age 0 to 15	310,161	17.99	96	3,056,423	19.43	103
Age 16 to 24	184,228	10.68	90	1,859,933	11.82	99
Age 25 to 44	445,214	25.82	94	4,869,242	30.95	113
Age 45 to 64	456,288	26.46	104	3,716,592	23.62	92
Age 65 and over	328,341	19.04	116	2,231,729	14.18	87

Socio-economic profile

In terms of socio-economic profile there is a higher representation of ABs in the 1 hour and 2 hour catchments.

There are more than **3.0 million** AB and C1s within 2 hours of the intersection.

Social Grade	Market							
	0 to 60 minutes				0 to 120 minutes			
	Heads of household*	Total population**	Area %	Index	Heads of household*	Total population**	Area %	Index
AB Middle and upper middle class	135,250	338,125	25.7	116	1,371,619	3,429,048	27.8	125
C1 Lower middle class	179,589	448,973	34.1	110	1,630,384	4,075,960	33.0	107
C2 Skilled working class	107,398	268,495	20.4	97	883,341	2,208,353	17.9	85
D and E Working class / Lowest levels of subsistence	104,730	261,825	19.9	76	1,054,831	2,637,078	21.4	82

Source: GeoPlan

4.4 Future priorities

In the context of East Sussex, tourism in Wealden is performing well, particularly its core day visitor market. In partnership with the newly formed Wealden Tourism Forum, which includes representatives from the private sector, the Council’s priorities for tourism are to:

- Conserve natural beauty – Wealden’s core product and main attractor;
- Raise awareness – locally and to wider audiences before they visit;
- Encourage and increase staying visitors – particularly off season;
- Encourage and increase visitor spend – from day and staying visitors; and
- Deliver a fulfilling and enjoyable experience that exceeds visitor expectations
- and delivers positive recommendations.

There is strong potential to utilise the growing wine sector to develop high profile activities and packages that could attract both international visitors and local audiences to engage with top quality English wine producers and smaller vineyards. Critically, it is vital to engage with other tourism businesses across the District, including accommodation, food and beverage and activity providers, to provide quality packages targeted towards high yield visitors.

5. Consultation: Themes and Issues

5.1 Approach

If the Council is to support the growth and development of the viticulture sector, it is important that businesses in the sector (and associated sectors) feel ownership and are part of the delivery mechanism. In addition to the primary research, the feasibility study has involved extensive discussions with stakeholders and partners (Appendix 2). A number of workshop sessions have been arranged including:

- Meeting with the Wealden Tourism Forum;
- Industry Workshop, and
- Meetings with the Client Team.

From the consultation, there is a notable level of commitment to grow and develop wine tourism and we perceive significant momentum in taking forward initiatives to make a positive contribution to its future development as an important regional attractor.

5.2 Themes and Issues

A number of common themes have emerged from these discussions and our research programme, which are summarised below.

5.2.1 Growing sector with significant potential

Despite its relative size, the sector is identified as having significant growth potential. Plumpton College, an important centre of excellence for education, training and research, was highlighted as a key local asset to grow, develop and support the sector. There is also potential to achieve ‘good growth’, balancing and utilising natural environmental assets to secure economic growth.

5.2.2 Bookable packages

One of the motivations of visitors is the desire to take part in experiences and wine tourism is a product that lends itself to experiential tourism. Overseas visitors in particular like to be able to easily book packages. Within the area, there are a number of successful operators designing and delivering wine tourism packages, including English Wine Tasting and Tours, Fizz on Foot etc. A number of people highlighted the need to develop more packages and products together to attract higher spending staying visitors, for example, wine and culture; wine and heritage.

5.2.3 Encourage partnership and collaboration

A further theme was to encourage greater collaboration among vineyards / wine producers as well as other industries that share common interests. There was also a need to ensure that developments and future interventions link with activities of Wine GB (the new entity following the merger of UKVA and EWP) and other trade bodies including South East Vineyards Association (SEVA).

As well as the value of exports from the viticulture sector, the East Sussex Growth Strategy suggests that there is a need to consider how the viticulture supply chain could be further developed. For example, all bottles are imported from France and all specialist manufacturing equipment is sourced from France and Germany despite there being a leading advanced manufacturing pumps cluster in Eastbourne.

There is a range of support and advice available to enterprise in the viticulture sector. There is a need to ensure that the sector is taking advantage of the existing support structure, e.g. Leader, Business Growth Fund etc

5.2.4 Deficiencies in the Wealden tourism product also need to be addressed

Despite the improved performance of the tourism sector, a number of consultees highlighted deficiencies in the Wealden tourism product, specifically the limited provision of quality serviced accommodation and limited product awareness. These would need to be addressed to support the development of wine tourism in the district.

5.2.5 English Wine Festival

There is strong support for an English Wine 'festival' / programme of events to celebrate English wines and viticulture in Sussex. However, there was a general feeling that such an event would need to move away from a traditional approach and package activities that will appeal to staying visitors. Building on the success of the Wealden Food and Drink Festival, any future festival would need to ensure clear differentiation with existing food and drink festivals in the region.

6. Good Practice in Wine Tourism

6.1 Case Examples

English Wine Tourism is still in its infancy, although an industry-led National Wine Tourism Strategy and Acton Plan is being developed. To understand what is expected from a world-class visitor experience, we have assessed a number of high-profile wine tourism regions as comparators for Wealden, which have made balanced investment to deliver compelling visitor experience, while at the same time seeking to retain authenticity and conservation value.

The case examples include:

- Stellenbosch
- Hunter Valley, Australia
- Margaret River, Australia
- Budapest Wine Festival

6.2 Key Success Factors

- **Importance of establishing a geographic locator for the region**
- **Providing a high-quality product as a starting point**
- **Importance of bookable packages via web-based application**
- **Wine tourism is the key driver, but in many instances the experience works alongside other nature-based experiences**
- **Collaboration and partnership working**
- **Using wine tourism to maximise revenue generation and retail offer**
- **Seasonality of product availability as well as the challenge of fluctuations in visitor flows in high and low seasons.**
- **Establishing a signature event as a means of growing market awareness**

Although there are clearly differences in the scale and scope of wine production and wine tourism (over 100 commercially-provided tours are available on the Margaret River destination website), there are a couple of core factors which are apparent in the majority of regions which are successfully developing wine tourism.

The authorities in the regions have recognised the relations and synergies between **food and wine** and have integrated food and wine as part of its overall marketing and positioning. This is supported by **proactive and responsive structures** to drive forward destination and campaign activity.

7. SWOT

Our Strengths, Weaknesses, Opportunities and Threats summary analysis is set out below:

Viticulture in Wealden	
Strengths	Weaknesses / Constraints
<ul style="list-style-type: none"> • Growing sector • Good soils and climate • Plumpton College • English Wine Centre • Visually attractive, peaceful setting and lots of 'charm' • Rich natural heritage and landscape • Tourism sector with good domestic performance • High satisfaction rating for visitor product • Large market catchment and reach into large and affluent markets within 2 hours (core short break market) 	<ul style="list-style-type: none"> • Lack of quality serviced accommodation • Small viticulture sector • Limited awareness of Wealden as a destination • Conflict between commercial development to grow viticulture businesses and planning constraints • Lack of joined-up working between planning and economic development • Poor (and limited) signage to some vineyards
Opportunities	Threats
<ul style="list-style-type: none"> • Future growth projections • Commitment of industry to collaborate, grow and develop the sector • Sussex PDO • National Wine Tourism Strategy • Increasing consumer interest in wine • Private sector wine tour operators • Growth in short break market • Potential to exploit interest in staging wine based event/ festival 	<ul style="list-style-type: none"> • Constraints on future development (mainly due to Ashdown Forest and restrictive planning regime) could further impact on growing wine tourism • Continuing dominance of Rathfinny and Bluebell may undermine growth of smaller, niche vineyards • Unless there is strong cooperation there may be over-duplication in some aspects of wine tourism product • Lack of available funding to sustain proposed initiatives

8. Moving Forward: Wine Tourism in Wealden

8.1 Moving Forward

Tourism makes a key economic contribution to the Wealden economy and the quality of life for the district's resident population. The district has assets with national (and international) visitor appeal and is a popular destination for day visiting. All indicators point to significant future growth in the regional / local visitor economy:

- The district should benefit from the continuing staycation trend in the domestic market and the growing demand for short breaks;
- The district has good potential to attract short break demand from the growing emptynester, early retired and pre-family markets;
- Wealden has a sizeable and growing catchment population for both day and staying visits.

However, given the environmental and landscape sensitives (particularly with regard to Ashdown Forest) the emphasis is on growing tourism value (and yield) rather than volume. The research, analysis and assessment suggest that wine-related tourism is an emerging product that has the potential to contribute to strengthening the region as a tourism destination with appeals to a variety of market segments.

A key consideration is the geographical focus for any future Action Plan. The general consensus from industry is that any future programme will probably need to be branded as Sussex-wide (scale and breath of opportunity) but ensuring that there is a specific focus on supporting the growing viticulture sector in Wealden.

The aim is to develop a focused Wine Tourism Action Plan that unites the industry and partners behind a common vision, brand and programme of interventions to take wine tourism forward specifically:

- Sussex-wide but with a specific focus on supporting viticulture in Wealden
- Align with (developing) National Wine Tourism Plan, which is being led by Wine GB
- Focus on clear market segment (s)

8.2 Vision and Objectives

The vision is for Sussex, including the Weald, to be recognised as a quality destination for premier food and wine products and experiences in both domestic and international market.

The focus of activities is on:

- **Building awareness:** High-profile events run and attended by the wine industry offer opportunities to build awareness to wine tourism amongst high yield visitors.
- **Building the capability of the sector:** A support infrastructure to encourage collaboration and to find ways to forge a united approach for greater impact and mutual benefit.
- **Building the market:** Develop quality packages and itineraries to cater to short break market and multi-day destination markets.

8.3 Target market

Our research and discussions with industry representatives lead to identifying priority target markets as follows:

Wine aficionados

- Aged between 30-75
- Educated and affluent
- Independent travellers
- Knowledgeable about English wine and viticulture

Group travellers (special interest)

- Aged between 40-75
- Educated and affluent
- Interest in rural tourism and 'experiences'

Independent high-yield visitor

- Aged between 30-75
- Educated and affluent
- Gain wine knowledge and experience wine setting

9. Action Plan

9.1 Introduction

Our priority projects and recommendations for action are identified below. These have been agreed by industry representatives as providing a good starting point to develop wine tourism in the area.

9.2 Wine Cluster

Introduction

Any future initiatives to develop and grow wine tourism will need to involve and be driven by representatives from the viticulture sector. The research and discussions with businesses demonstrated a strong desire to find new and better ways of partnership and collaboration to achieve mutually beneficial outcomes.

Rationale

A clear recommendation coming out of the industry workshop was the need to improve dialogue between vineyards and other parts of the tourism sector.

Industrial clusters are defined as geographic agglomerations of firms specialising in one or more connected industries. Industrial clusters are often considered to be an effective way of enhancing the innovative and competitive performance of firms. A core feature of clusters is local embeddedness, that is involvement in a number of informal / formal social linkages at a local level, which are often believed to foster trustful and cooperative behaviour among competing firms.

The concept of wine tourism suggests that opportunities for networking and cluster development are essential in order to achieve competitive advantage. The analysis of good practice identified the importance of effective partnership structures to ensure that representatives from the public and private sector are involved in shaping initiatives to enhance the range and depth of visitor experiences and be sufficiently resourced to engage in the type of partnership necessary to deliver the region's potential. In many instances, the cluster groups are part of a larger tourism partnership.

As well as being industry-led, an important issue is to ensure that the group works with other regional and local partners to position wine tourism as a key pillar of local and regional tourism marketing.

A number of wine clusters are evolving in the region. For example, a Kent Wine Cluster has recently been established to develop and promote wine tourism in Kent. Coordinated by

Chapel Down, partners include Gusbourne Estate, Hush Heath Estate & Winery, Domaine Evremond, Squerryes Wine & Winery, Biddenden Vineyards and Simpsons Wine Estate. Plans are being developed to design a number of initiatives, including linked trails, to increase awareness and create 'real experiences for real people'.

Plans are also in train to establish a wine cluster for Sussex. Sussex Wineries is a new collaboration, under the direction of Rathfinny to promote the Sussex PDO. The intention is to bring on board wineries from East and West Sussex. Sussex Wineries is a collaboration between some of the larger producers in Sussex including: Albourne Estate; Bluebell Vineyard Estate, Bolney Wine Estate, Oxney Organic, Rathfinny Wine Estate, Ridgeview, Stopham Vineyards, Tinwood and Wiston Estate. At this stage, it is unclear as to the scope and scale or proposed activities.

At a local level, a number in vineyards in the Weald have come together to assess opportunities for future collaboration. Marketing under the 'Vineyards of the Weald²' umbrella, the group includes a number of vineyards in the Horam / Heathfield area (e.g. Hidden Spring, Off-the-Line etc), who are keen to grow and develop wine tourism. An issue identified by the participants is a lack of resources to coordinate building the local cluster group. However, they are keen to expand and include other enterprises from the tourism and hospitality sector in the group. East Sussex County Council indicated a willingness to investigate providing to support a local cluster group for the viticulture sector.

Locate East Sussex has indicated that they are planning to set up a land-based sector cluster group to support rural economic development in East Sussex. They would be interested in exploring ways of involving the viticulture sector in such a group.

Objectives

With substantially reduced public sector tourism budgets, the private sector will need to take a greater leadership role on marketing and product development: public sector support and funding will still be needed however to facilitate private sector marketing collaboration and build the marketing skills of tourism business operators.

It would seem appropriate **to build and develop the private sector capacity of the local Wealden wine 'cluster' to improve coordination and marketing and share best practice in growing and promoting the wine tourism product in Wealden.**

The objectives of the group would be:

² Working title

- To champion the local wine and viticulture sector in Wealden.
- To develop and deliver a local Wine Tourism Action Plan with agreed performance / output targets with a focus on:
 - Developing wine and food tourism experiences
 - Facilitating festival and events
 - Building packages
- To raise the profile of the area, specifically amongst appropriate regional and national organisations, as a growing destination for wine tourism;
- To be consulted on other programmes which contribute to the growth and development of wine tourism in the region;
- To ensure that appropriate communication and consultation strategies are in place and implemented.

Actions

It is likely that Wealden District Council will need to take an initial lead-role in supporting the development of the group. Key early actions include:

- Review the current membership / activities of the local wine group;
- Facilitate a meeting of the group to consider future terms of reference and resource requirements (Plumpton College has expressed an interest in being involved);
- Develop an outline Action Plan prioritising activities for the next 12 – 24 months;
- Assist develop a wine cluster proposition to East Sussex County Council / Locate East Sussex regarding future resourcing and pilot marketing programmes;
- Draft revised terms of reference;
- Consider re-launching the group during English Wine Week.

9.3 Bookable Packages

Introduction

Wine related tourism has been shown to grow local economies in many wine regions of the world. The most successful regions make it easy for wine tourists to book vineyard tours, including accommodation, in advance of their visits.

Rationale

There is increased interest in wine related breaks and experiences across the world and the

workshop group recognised the opportunity for Wealden to use bookable wine packages to attract high value visitors to the area, specifically short-breaks.

Two private sector wine tour operators are already operating in Wealden (EWT&T and Fizz on Foot) and more companies are starting up as the number of wine estates offering tastings and other activities increases. Existing (non wine) tourism companies such as Brighton & Beyond have expressed an interest in offering wine related tours.

Accommodation providers want more joined up thinking and support to attract visitors into the area.

Objectives

Visitors are already attracted to the Wealden area through a range of cultural destinations and sightseeing highlights. The vineyard sector can build on this by targeting high spending visitors from London, SE England and local area who are interested in wine.

- Promote wine related bookable activities, day trips and overnight stays in Wealden.
- Make booking as easy as possible.
- Involve existing private sector wine tour operators, vineyard clusters + stakeholders such as the English Wine Centre and Plumpton College and accommodation providers.
- Use best practice from other wine areas and countries

Actions

It is likely that the cluster group (9.2) will take a lead role in driving this programme forward. Core activities include:

Review and identify a list of participating partners:

- Wine tour companies
- Vineyards / Wine Estates
- English Wine Centre
- Plumpton College
- Places to stay - accommodation providers (hotels, B&Bs, pubs, Air BnB hosts)
- Places to eat - restaurants and pubs

Create a brand for the bookable packages

- Commission a branding specialist to establish a brand and logo so that the wine sector in Wealden can own and communicate the experience that people will be searching for. (Consideration will need to be given to the future activities of Sussex Wineries)

Develop a communications and promotional plan to be visible to target audience

- Consider best routes to market amongst existing tourism organisations in terms of reach and numbers - Wealden website, 1066, Love Sussex, South Downs National Park, Visit England / SE England / Britain), Wealden Attractions Guide, TripAdvisor, AirBnB, Expedia, Bookings.com
- Partner with recommended tourism organisations so that they host branded click-through links and wine experience packages on their websites
- Commission a SEO³ specialist to recommend best quality and highest volume online search terms to attract target audience
- Create a branded web portal where you can link to wine tour operators, vineyards, places to stay, places to eat and other things to do (see www.margaretriver.com)
- Create a branded Facebook page that links to wine tour operators, vineyards, places to stay, places to eat and other things to do
- Consider designing and printing branded trail maps that can be sited at vineyards, English Wine Centre and participating restaurants, pubs, hotels and accommodation providers.
- Look to partner with gift experience market (eg. Red Letter Days, Buy a Gift)

Delivery

As indicated, it is likely that the cluster group (9.2) will have a prominent role for this programme although initial pump-priming is likely to be required from the public sector. Again, consideration will need to be given to the geographic focus of the project and how it links with other cluster activities being planned by Sussex Wineries. To ensure a quality product, the project should be briefed to a marketing specialist agency within the area and a budget should be created for the project.

³ Search Engine Optimisation

9.4 Wine Festival

Introduction

Most renowned wine areas in the World play host to some form of annual festival to celebrate and promote their product and place of origin. Wine events and festivals are becoming popular worldwide and are recognised as a regular feature of wine tourism experiences held to celebrate winemaking and wine culture.

Rationale

As shown in Section 3, the industry survey of producers in Wealden elicited unanimous support from the sector in terms of backing for an English Wine Festival staged in the district. Many producers operate on limited staffing levels and cannot justify organising an event for each individual winery.

The Council has provided financial support for the Wealden Food and Wine Festival, which was held at Pevensey Castle. The evaluation for the 2016 event indicated that around 7,000 visitors attended the event, which included 41 exhibitors. The event proved a success (67% rated the event as excellent) although it is apparent that the vast majority of visitors came from the local (Wealden / Eastbourne) area.

There is clearly an appetite for a wine 'event' with or without pump-priming from the public sector. A successful festival can act as a shop window for the wine area and represent an important promotional tool in establishing market presence (and ultimately growing market share). In the case of Wealden, it offers an opportunity to promote this fast growing, emerging business sector.

It is important to consider what is the most logical geographical boundary to focus on. As this project is being spearheaded by Wealden, we have inevitably looked at the potential for a Wealden or Weald based dimension to any event. However, the term Wealden or even Weald have little traction in the wine marketplace at present and in our view have limited potential. Sussex offers greater opportunities and there is some logic to this as the main focus given the proposed PDO status for the County.

Objectives

A successful wine festival has a range of potential positive outcomes. The principal purpose of the wine festival is to increase wine sales for producers but it is also seen as an important

component of the marketing mix to enhance market awareness of the wine 'region'. Other objectives in order of priority include

- Add to tourism offer in the region
- Promote wine produce
- Show local wines can compete with World renowned brands
- Offer strong appeal to staying visitors

Style of event

Prior to considering the resources, funding and delivery options, it is important to recognise there are differing styles and scales of event which could be pursued in the area. Wine festivals are typically about drawing in the local communities and visitors to enjoy wines of the local region. They are often staged in association with gastronomy events, music and the arts.

The main options for the different type of events for consideration include:

- a) a week-long series of activities with a wine theme. This acts as more of a celebration of all things in an area, similar to the approach taken in Hunter Valley Australia. Linking quality wine produce with a quality natural environment worthy of a visit. This could generate valuable PR opportunities and drive visits from out of area from around the UK and internationally. It could be positioned to offer appeal to both industry (producers and buyers) as well as the general public (more high spending visitors).
- b) building on the success of Pevensey Food and Drink Festival to bring in local wine producers alongside other food producers. This has largely local appeal geared mainly at consumers. It has some elements akin to a farmers' market approach.
- c) Totally public consumer wine event to introduce people to English wines as part of a wider offering. This event would be ticketed with an appropriate admissions price to reflect the offer and duration of visit.

This model works well in various locations including Winchester where local producers are able to 'rub shoulders' with renowned international brands. It has the potential to be replicated elsewhere (i.e. beyond Winchester) with a local theme interjected.

- d) An aspect within a wider Festival such as National Wine Week by Wine GB

As part of the research programme we have assessed existing festivals and events which have been successful. These include:

- The Wine Festival Winchester,
- Brighton Wine Fair
- Vineyards of Hampshire Wine Festival at Hattingley Valley
- Cobnut Fair 2017
- English Wine Week

Further summary descriptions and details of these are attached as Appendix 3.

The lead preference among industry representatives is for an event aligned with an existing event such as English Wine Week or a more specialist ticketed event for connoisseurs and enthusiasts. A week-long series of events also generated a level of support from producers. There is less 'appetite' for a food and drink festival more akin to a farmers' market approach although this could be an element of a wider festival programme.

Actions

The concept of a Wine Festival has synergy with the wider priorities in terms of:

- events work well with organised packages;
- local wine industry network could be natural organisation to take a lead role in delivery, and
- there is a potential to incorporate a strong educational and lifelong learning strand to the event

In some ways the event risk is mitigated if it is aligned with a wider programme.

Key actions include:

- Secure input and ownership from the local wine cluster to the concept of a Wealden Wine Festival, including the style of the event (s).
- Consider piloting a series of Wealden-wine events during English Wine week working in association with the new industry body Wines GB, e.g. Wealden Wine Academy etc.

- Collaborate with the new owners of the English Wine Centre to look at opportunities to re-introduce an annual event at that operation and also to work closely with Plumpton College as a key partner in delivering the event

Delivery

In terms of delivery a lead industry event will undoubtedly require a level of sponsorship. A further key component is to look at marketing and positioning to explore how best to differentiate the festival from existing events in the existing marketplace.

Key areas to consider in event delivery include:

- Venue hire
- Consumer ticketing
- Guest list
- Exhibitors
- Url - website, brand ownership
- Promotion and PR

10. Role of Wealden District Council and Next Steps

The feasibility study demonstrates wine-related tourism is an emerging product that has the potential to contribute to strengthening the region as a tourism destination with appeals to a variety of market segments.

A wide range of organisations will need to be involved in realising the potential of wine tourism in terms of developing projects, including:

- The private sector
- Wealden District Council
- East Sussex County Council
- Locate East Sussex
- 1066
- Plumpton College
- South Downs National Park Authority

All the projects require a reputable and trusted coordinator to manage and steer the initiatives forward. Wealden District Council can share its knowledge of key stakeholders and contacts within the area and (subject to agreement / available resources) provide a valuable role in all three models acting as the client and co-ordinator for the project. Initially, the District Council's Tourism team will need to lead on the development of the programme.

The core activity will be to formalise the local Wealden wine cluster group and facilitate its development as an industry-led organisation, which can drive forward plans for the sector. Some initial pump-priming resource will be required (staff time and financial support) to support the group as well as funding some early-win initiatives. It will be important to understand and engage with Sussex Wineries to avoid duplication and ensure regional collaboration.

Immediate next steps are set out in the following table.

Wealden Wine Tourism Action Plan (Short Term)

Action	Lead	Timeframe
Coordinate and facilitate meeting with ESCC, Locate East Sussex, SDNPA and Plumpton College to review feasibility study and suggested actions, including: <ul style="list-style-type: none"> • Secure buy-in to local cluster group • Agree 'support' arrangement • Consider pooling funding to create "local initiatives fund" 	WDC	April 2018
Arrange meeting with Wine GB to discuss viticulture feasibility study and future recommendations	WDC	April 2018
Review the membership / activities of current local wine group and arrange meeting with Hidden Spring (Chris Phipps) to discuss potential of supporting the development of local wine cluster group	WDC	
Distribute Executive Summary to key stakeholders and partners, e.g.: <ul style="list-style-type: none"> • Wealden Tourism Forum • Sussex Wineries • All organisations / people who attended industry workshop 	WDC	April 2018
Arrange meeting with the English Wine Centre to discuss potential 'launch' of Wealden Wine Initiative during English Wine Week (24 th May – 4 th June). Consider piloting a series of Wealden-wine events during English Wine week	WDC	April 2018
Launch Wealden Wine Tourism Initiative during English Wine Week working in association with the new industry body Wines GB, e.g. Wealden Wine Academy etc.	WDC	May 2018
Collaborate with the new owners of the English Wine Centre to look at opportunities to re-introduce an annual event at that operation and also to work closely with Plumpton College as a key partner in delivering the event	WDC	May 2018
Discuss bookable packages project with existing operators to identify barriers to growth and routes to market	WDC/cluster group	June 2018

Support the Cluster Group develop a 3 Year Action Plan prioritising activities	WDC/cluster group	May-August 2018
Secure input and ownership from the local wine cluster to the concept of a Wealden Wine Festival, including the style of the event(s).	WDC/cluster group	May-August 2018
Scope out potential design and development of a Wealden Wine Tourism website to promote existing product offer	WDC / cluster group	May – June 2018
Create a brand identity for the Wealden Wine Tourism Initiative	WDC/cluster group	May-Sept 2018

Appendix 1: Wealden Vineyards

Rathfinny Estate

Bluebell Vineyard Estates

Davenport Vineyards

Sussex Vineyards - Lakestreet

Sussex Vineyards - Hobdens

Claytons - St Quentins Vineyard

Claytons - Clayton Hills Vineyard

Hidden Spring Vineyard

Busi-Jacobsohn Wine Estate

Newnham Park Vineyard

Springfields Vineyard

Henners Vineyard

Off The Line Vineyard

Beacon Down Vineyard

Blackboys Vineyard

Hollow Lane Vineyard

Ketches Farm Vineyard

Barnsgate Manor Vineyard

Burwash Weald Vineyard

Sheffield Park Vineyard

Woodreed Vineyard

Downsview Vineyard

Wildwood Vineyard

Eridge Vineyard

West Hendall Farm Vineyard

Compton Combe Vineyard

Appendix 2: Consultees

Name		Organisation
Abi	Stevenson	Buxted Park Hotel
Stewart	Drew	Chairman 1066 Country and Director DLWP
Cllr Nick	Collinson	Chapter 12 Wine Bar; Community Leadership,
Philip	Johnson	Director, Locate East Sussex
Sally	Staples	East Sussex County Council
Russell	Lines	East Sussex National Hotel
Richard	Dawson	Economic East Sussex County Council
Belinda	Mercer	General Secretary of the South East Vineyards Association
Gerry	Sherwin	High Weald AONB
Chris	Foss	Head of Wine Department Plumpton
Charles	Hooper	Shovelstrode Forest Garden
Hilary	Knight	Sussex Food Network
Jo	Williams	Sustainable Tourism South Downs National Park
Graham	Peters	TEAM East Sussex
Dee	Mcdonald	The National Cat Centre
Don	Cranfield	WARR LEADER Action Group
Ana	Christie	CEO Sussex Chamber of Commerce
Tamara	Roberts	Ridgeview
		Nyetimber
Mark	Harvey	Chapel Down
Julia	Trustram Eve - Marketing Director	English Wine Producer
		Great British Wine Tours
Ian	Shearer	Fizz on Foot

Appendix 3: Existing Wine events

1. Wine Festival Winchester

Wine Festival Winchester offers a chance for people of whatever level of knowledge about wines to enjoy a showcase of around 300 wines. The festival has been established and is run by two Masters of Wine from BBC1's Saturday Kitchen Susie & Peter Richards.

The festival features a wide range of delicious wines which all visitors can sample for free, from brilliant English wine producers to prestigious global brands via local wine shops and a wide range of quality wine suppliers.

The event is ticketed. Admission is £30 per person for a four hour session and there are three sessions at the Winchester Guildhall over a weekend in late November.

Exhibitors are a mix of English wine producers with a Hampshire bias (Danebury Vineyard, Exton Park Vineyard, Furleigh Estate, Hattingley Valley, Raimes English Sparkling but also closer to home Chapel Down, Denbies, Nyetimber and Oxney Vineyard from Rye in East Sussex). There are also prestigious wine merchants such as BBR, Avey's, The Wine Society, Waitrose Cellar and M&S together with international wine producers (Villa Maria, Quinta do Noval, Sandeman, Bodegas Norton) alongside wine bodies such as Wines of Chile and Wines of Germany and local artisan food companies.

The wine festival has several high profile sponsors and around 250 people attend each session.

Masterclasses, live music, a high quality food offer and a prize draw are among the highlights of the weekend, as well as the innovative Follow Your Taste scheme, which helps guide wine-lovers through the extensive range of exquisite wines available.

<http://www.thewinefestival.co.uk/>

2. Brighton Wine Fair

The Brighton Wine Fair has been running for the last four years in central Brighton. The venue for the last two years has been in The Grand on the seafront in Brighton.

This is a quality consumer wine fair that brings together wine lovers from Brighton & Hove and the surrounding area with Brighton wine merchants and Sussex wine producers.

Visitors buy a ticket online (www.brightonwinefair.com) in advance of the event - £30 for two, £20 single. This entitles them to entry to the wine fair and the chance to taste wines from exhibitors for free. A wine tasting glass is provided on arrival. The event attracts in the order of 150 visitors.

Exhibitors provide a minimum of six wines. Tables are free and they get the opportunity to have quality conversations with discerning wine enthusiasts and also to sell wines at the event. Some exhibitors take orders for future delivery.

Previous exhibitors have included Butlers Wine Cellar, Ten Green Bottles, Twenty One Wines, Majestic Brighton & Hove, Seven Cellars, Pacta Connect, Elwood Wines, Ridgeview Wine Estate, Wiston Estate, Bluebell Vineyard Estate, Bolney Wine Estate, Court Garden, Albourne Estate, Plumpton Estate, Sussex Vineyards, Hidden Spring, WSET and Great British Wine Tours.

The next Brighton Wine Fair will be held in September 2018.

3. Vineyards of Hampshire Wine Festival at Hattingley Valley

The Hampshire Food Fare Festival has been a celebration of local produce for 15 years. The event highlights Hampshire's delicious flavours created by chefs, winemakers and producers.

The Wine Festival is part of the wider event and last year showcased seven of Hampshire's wine producers: Hambledon, Cottonworth, Danebury, Exton Park, Meonhill, Jenkyn Place and Hattingley Valley. The wine producers offered tastings and shared their wine making knowledge with interested visitors. Delicious local produce was on offer from Parsonage Farm, Hill Farm Juice, Yarty's Cordials, Jake's Artisan Pies, Lyburn Cheese and a Braai.

The event welcomed over 700 visitors the challenging British weather did not deter and the wine festival witnessed many visitors returning to cars laden with Hampshire wine.

<http://www.hampshirefare.co.uk/whats-on/vineyards-of-hampshire-wine-festival-at-hattingley-valley>

4. Cobnut Fair 2017

This is mainly a food focussed event but does have a drinks element. In 2017 it attracted 500-600 people per day for two days over a July weekend. It is a free to enter event currently with some 40 exhibitors.

It has been successful in attracting Leader funding via WARRLDP

Objective: To do for Sussex and Kent what the Aldeburgh Food Festival has done for Suffolk

A weekend event that has a longer life afterwards

Rationale: There are just as many great food and drink producers as Suffolk or the West Country but there is not yet joined up thinking on this area.

East Kent and West Sussex are better at it. One of the challenges is the lack of awareness of Wealden and East Sussex / West Kent border area

The 2018 Cobnut Fair is being planned and it wants to attract local wine producers to the event.

The 2017 fair featured food producers, a distillery and a micro brewery.

A food trail map is being planned so that visitors to the event can continue to find, support, visit and buy from the producers featured.

5. English Wine Week

English Wine Week organised by English Wine Producers provides an opportunity to promote English Wines to customers. Vineyards and outlets nationwide highlight English wines with tastings and other programmed events to help consumers get to know the wines better.

It is geared for retailers, trade or wholesalers. The organisers (the new trade body now known as Wine GB) acknowledge the more outlets that take part, the greater the collective impact. The main objectives are to:

- to help sales,
- boost marketing efforts
- raise the profile of English wine labels
- gain coverage in local and national press

The event offers

- **Point of sales materials**
- **Marketing toolkit**
- **Entry onto calendar of activities**
- **Access to social media network**
- **Liaison with press**
- **Networking opportunities**

Hundreds of outlets already participate, including vineyards, on- and off-trade.