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Coastal Tourism Business Survey 2025 Autumn Wave

Survey live between 15th September – 28th October 2025

NCTA Business Survey

2025 – Autumn Wave (survey was live between 15th September – 28th October 2025)

This wave reflects on performance over summer 2025

Key Headlines

- Growth Aspirations: 48% of businesses are committed to growth and investment, while 18% plan to sell or retire within two years—higher than previous waves.
- Summer 2025 Performance: Although turnover varied, 89% of businesses reported increased costs, leading to reduced profitability for 63%.
- Business Confidence: Confidence has dipped slightly, with only 41% feeling at least somewhat confident about the next six months. Economic climate and rising costs are top concerns.
- Winter Planning: 37% plan to close for at least one month, 35% are delaying investment, and 23% intend to reduce staff. Mondays and Tuesdays are the most likely days for closures.
- Investment Intentions: 43% of businesses plan no investment in 2025–26, while only 7% are planning major investments over £100,000.
- Top Priorities: Reducing costs (94%) and increasing year-round business (88%) are the leading priorities, with declining emphasis on sustainability, accessibility, and skills.
- Visitor Profile Changes: There's a net decline in UK staying visitors, but European visitor numbers are increasing.
- Budget & Support Requests: Businesses want VAT reductions (59%), more destination marketing (50%), and lower business rates (46%). Digital marketing and AI are top areas for business support.

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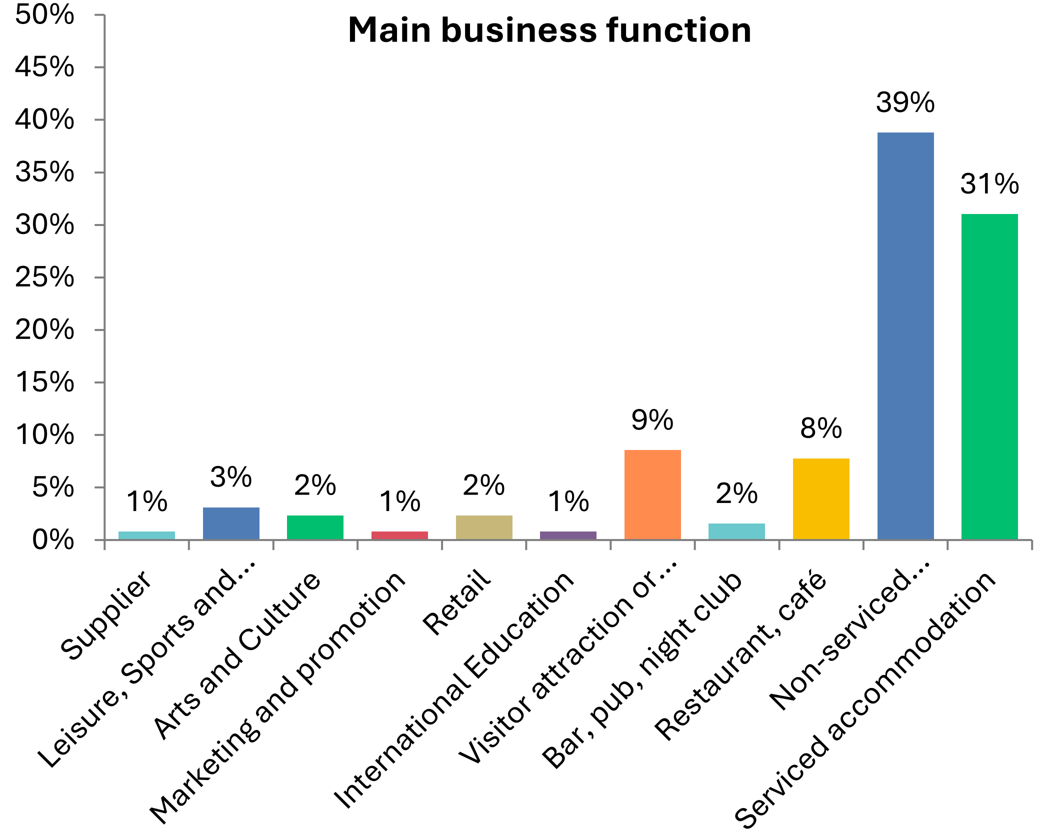
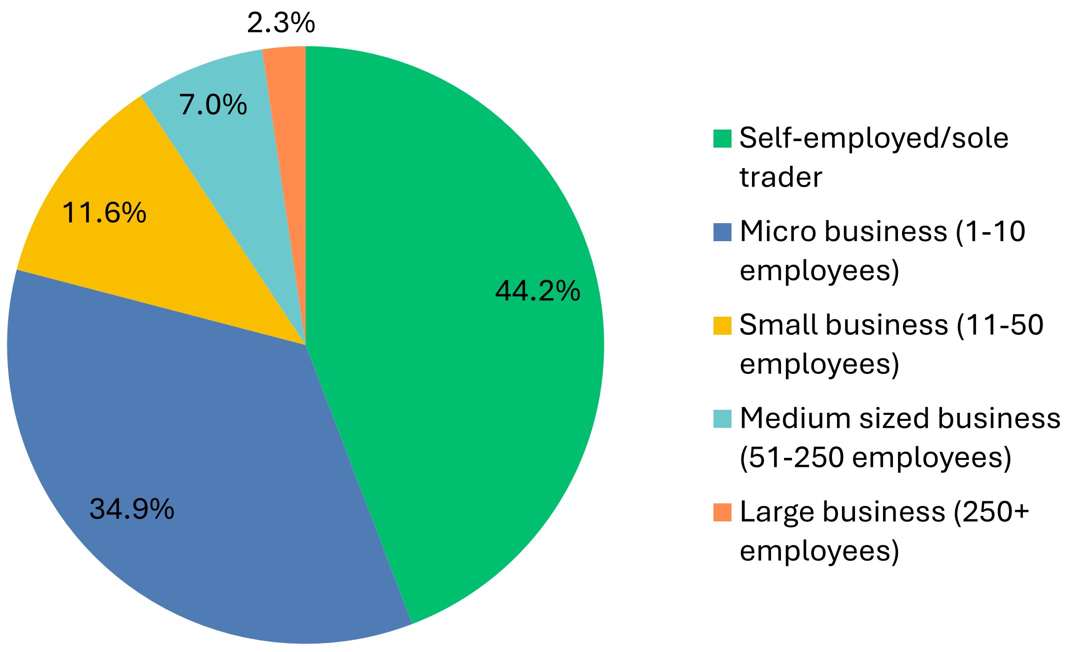
About respondents





95% of businesses stated that they are independently owned, 1% are part of a local or regional chain, 1% part of a national chain and 4% part of a charity or not-for-profit organisation

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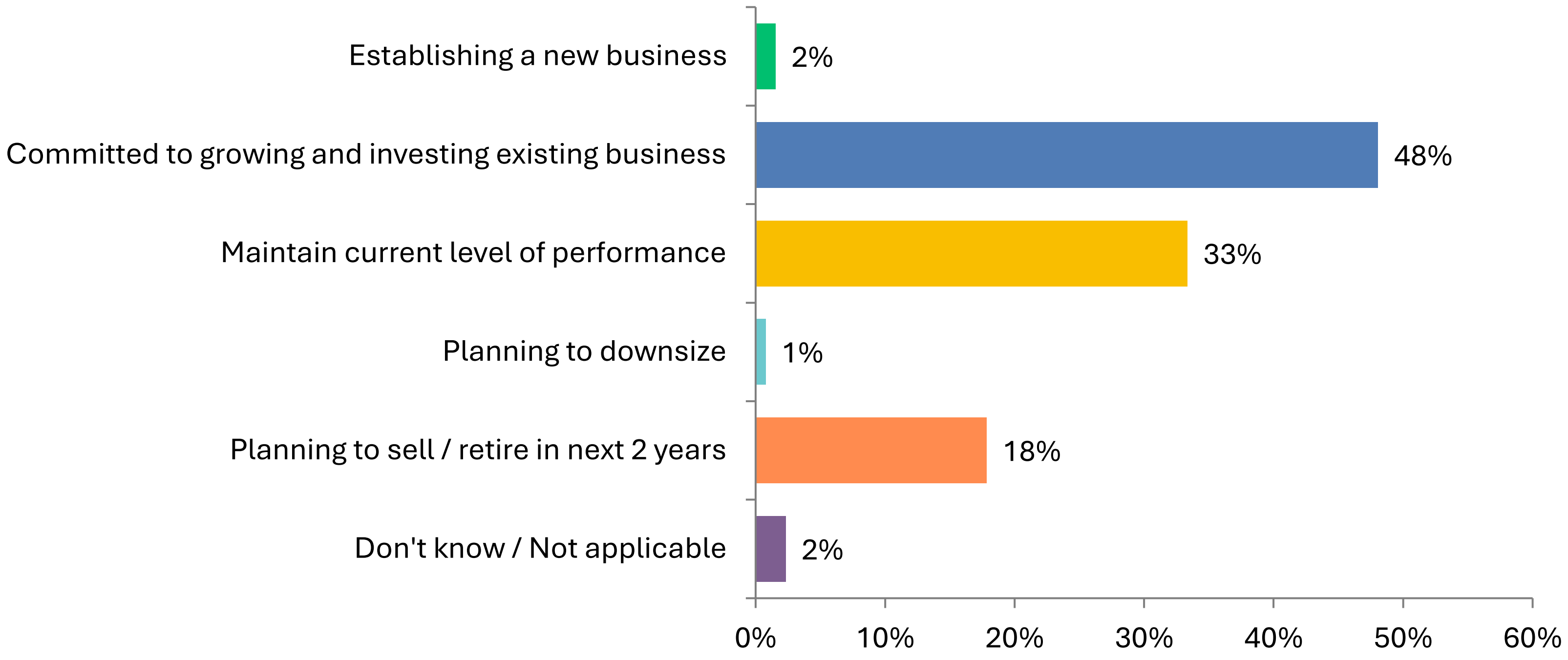
Future aspirations

In this wave we continue to explore attitudes to growth and aspirations of the business. The majority of businesses stated that they are committed to growing and investing in the existing business (48%), a third (33%) are trying to maintain current performance and 18% planning to sell or retire in the next 2 years.



These results differ to previous waves showing a higher percentage of those looking to sell or retire, this could be related to the higher mix of accommodation completing this wave of the survey.

The number looking to sell or retire in the next 2 years is still significantly below pre-covid levels.

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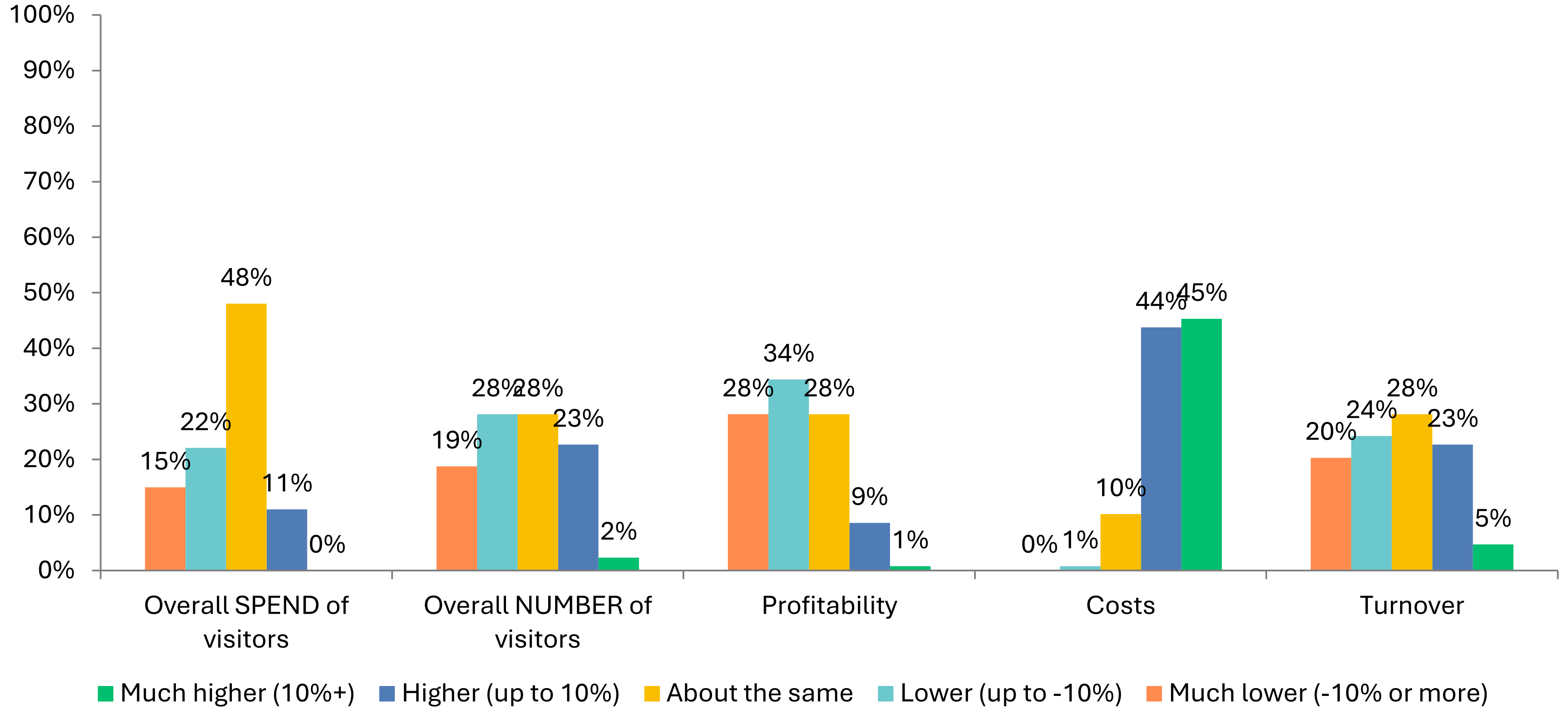
Business performance in summer 2025 compared to same period in 2024

Whilst the results show mixed performance amongst businesses of turnover so far during 2025, the vast majority of businesses reported an increase in costs (89%) which meant that majority of businesses showed a reduction in profit (63%).

There are more businesses that state overall visitor spend is down so far this year than up (net -26 pts).



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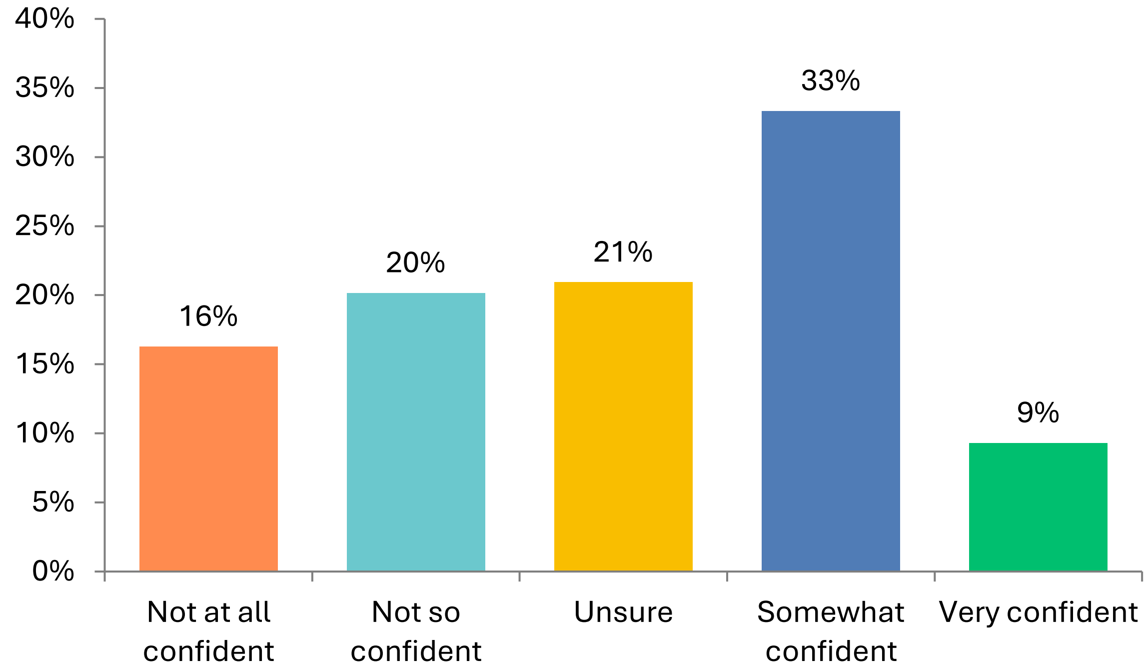
Business Confidence

How confident do you feel about your business trading over the next 6 months (to end March 2026)?



Confidence is slightly lower than previous waves – with 41% of businesses at least somewhat confident about the next 6 months of trading and 36% not confident (up 5pts on previous wave).

Top external impacts:

- Economic climate 87% (+9pts on previous wave)
- Increasing costs 80%
- Seasonality of the destination 51%
- Increase in water bills 37%
- Poor / unpredictable weather 36%

Other notable responses:

- Competition from other local businesses 29%
- VAT threshold 27%
- Competition from overseas holidays 26%
- Increase in storms and extreme weather 20%

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Planning for winter

In this wave we asked businesses how they're preparing for the winter season considering opening and staffing patterns as well as investment levels

A third of businesses are not planning to change their business model at this point in the year.

More than a third (35%) are delaying investment, 37% are planning to close for at least one month over the winter period and almost a quarter (23%) are planning to reduce the number of staff they employ.

Of the businesses looking at closing on certain days of the week - Mondays (13%) and Tuesdays (12%) are the most likely days that businesses will close while almost all businesses plan to continue to trade on Thursday, Friday, Saturday and Sunday.

Is your business planning to cut costs or change your operating model through any of the following measures in the next 6 months?	
Reducing number of staff	23%
Delaying investment, building or maintenance works	35%
Closing certain days of the week	16%
Reducing the service(s) available (e.g. stop serving lunch, closing swimming pool)	6%
Opening later / closing earlier each day	9%
Completely closing for a short fixed period of time (up to one month)	18%
Completely closing for 1-3 months	16%
Completely closing for more than 3 months	11%
None of above	33%

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Investment levels

Investment levels for 2025-26 are mixed with 43% planning no investment into the business this year. Given only 18% are planning to sell the business this figure is high and reflective of those businesses who state they have made a much lower profit than last year.

A third plan to invest up to £10,000.

Notable there are a small percentage planning major investment with 7% planning more than £100,000 investment.

What level of investment are you planning to invest in your business in 2025-26?	
Zero / no investment	43%
Up to £10,000	34%
£10,000 - £24,999	11%
£25,000 - £49,999	2%
£50,000 - £74,999	2%
£75,000 - £99,999	2%
£100,000 - £149,000	2%
£150,000 - £199,999	2%
£200,000 +	3%

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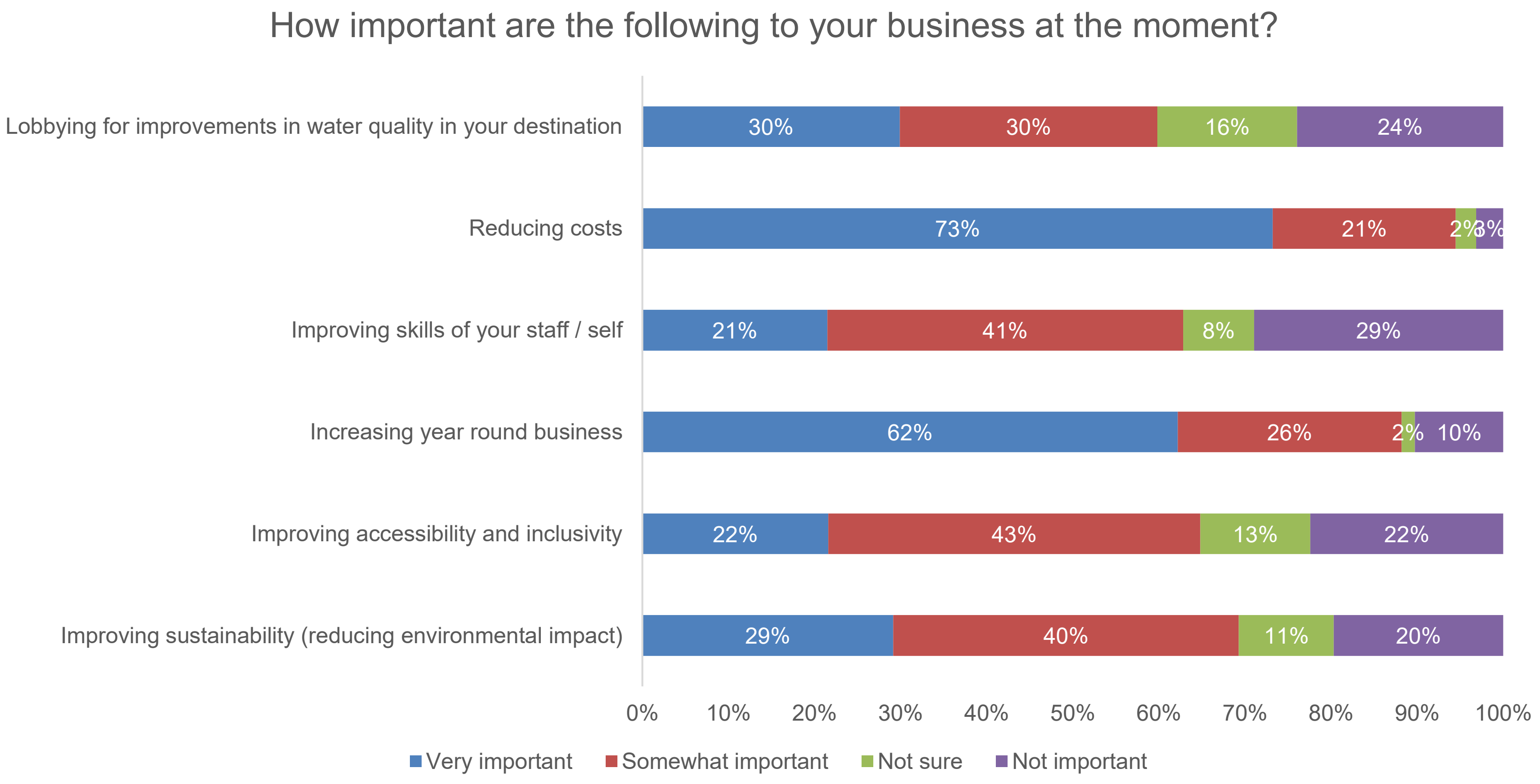
Business priorities



<u>Top priorities:</u>

#1 Reducing costs 94%

#2 Increasing year round business 88%

#3 Improving sustainability 69%

#4 improving accessibility and inclusivity 65%

#5 increasing skills 63%

The importance of sustainability, accessibility and skills have all dropped since the last wave of the survey, reflecting perhaps the previous question on investment levels.

The top two responses remain unchanged with consistent levels of support - Reducing costs and Improving year round business.

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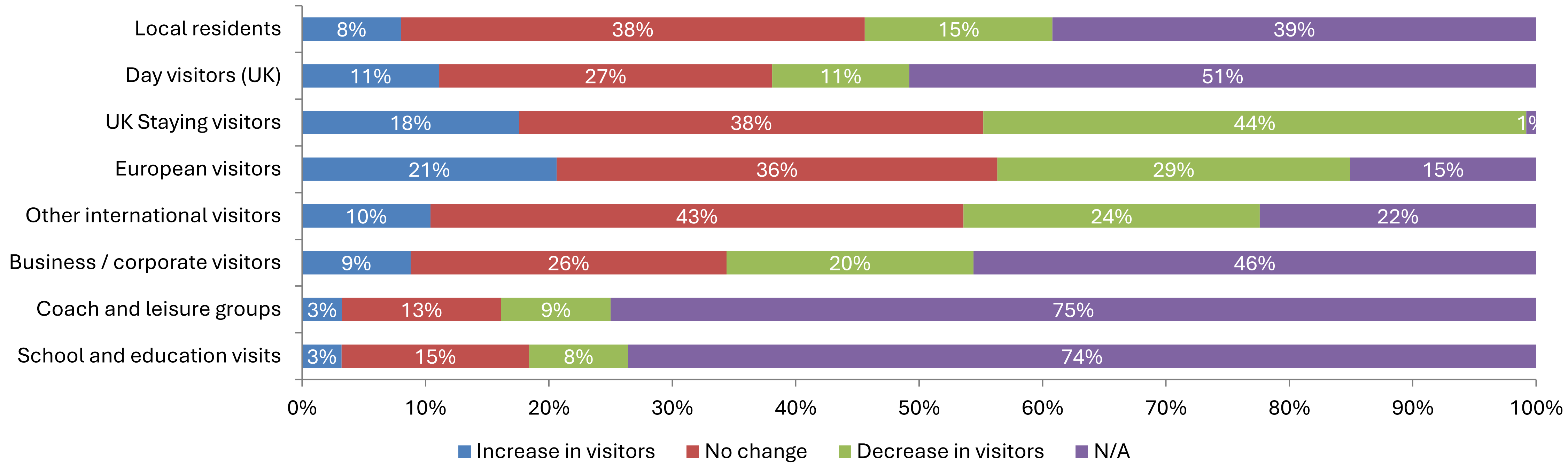
How have your visitor types changed in 2025?

The key markets businesses have noticed changes in their visitor profile during 2025 are a net decrease in the number of businesses seeing a decline in UK staying visitors (-26 pts of increase in visitors less decrease in visitors), positively the number of businesses reporting an increase in European visitors continues to grow with 21% reporting an increase.



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Budget asks

In this wave we asked businesses what interventions they would most like to see in the forthcoming UK Government Budget in November 2025.

The top response was a reduction in VAT (59%) followed by half of businesses wanting to see an investment in destination marketing and 46% wanting a reduction in business rates.

Responses under “other” include compulsory registration, corporation tax changes, Airbnb regulation and increase the VAT threshold

Reduction in VAT for hospitality and tourism	59%
Greater investment in destination marketing	50%
Reduction in Business Rates	46%
Reduction in Employers NI	45%
Business support to improve the efficiency / reduce costs in your business	35%
Other	22%
Business support to maximise sales opportunities and revenue	19%
Reduction in storm overflows at local beaches	19%
Improvements in water quality	16%
Introduce a scheme for low skilled workers to enter the UK	8%
Support to recover from Fylingdales Fire	2%

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Business support

When asked what support businesses would most like to see, Digital marketing is still the top response, followed by Sales and AI. Innovation to lower costs has moved up the priority list.

Walkers and Nature and Wildlife remain the top product areas businesses are looking to develop in the future

Which of the following markets are you interested in developing in 2026?

- Walkers 70%
- Nature and Wildlife 66%
- Cyclists 63%
- Heritage 52%
- Arts and Culture 43%
- Sustainable 38%
- Activities / watersports 36%
- Business events 28%
- Accessible 23%
- Wellness and spa 17%

Which (if any) Business support, training and webinars would you be interested in:

- Digital marketing 52% (-5)
- Increasing sales 47% (-5)
- Using AI in your business 41% (+1)
- Innovation to lower costs 38% (+4)
- Research and latest trends 33% (-3)
- Sustainability 24% (-5)
- Customer service 14% (-2)
- Management 13% (-5)
- Accessibility 13% (+1)
- Product or experience development 11% (-11)

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