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# Coastal Tourism Business Survey 2025 Summer Wave

Survey live between 21<sup>st</sup> May – 29<sup>th</sup> June 2025

# NCTA Business Survey

2025 – Summer Wave (survey was live between 21<sup>st</sup> May – 29<sup>th</sup> June 2025)

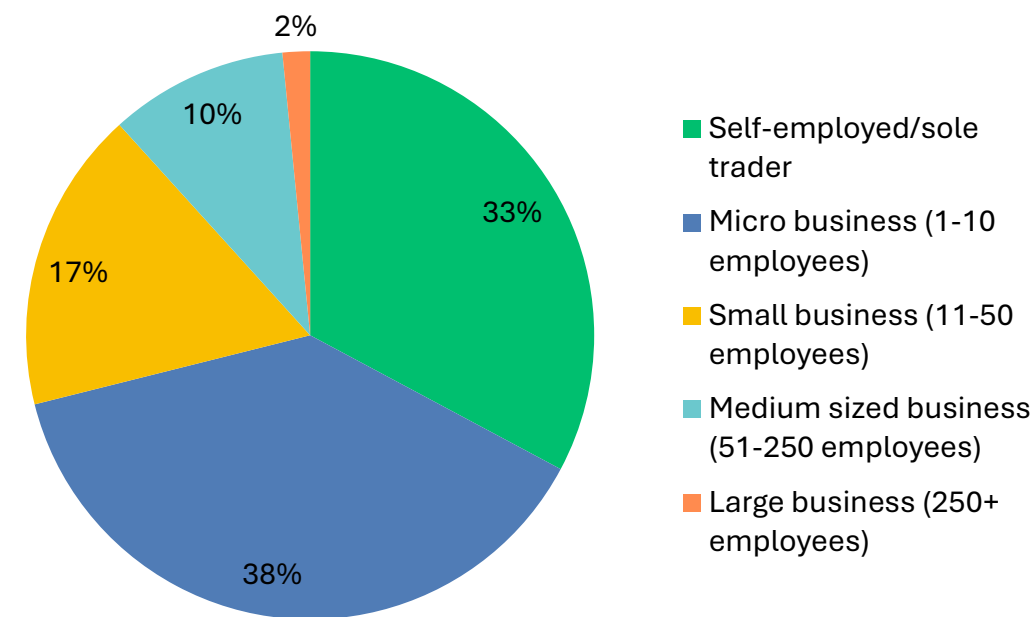
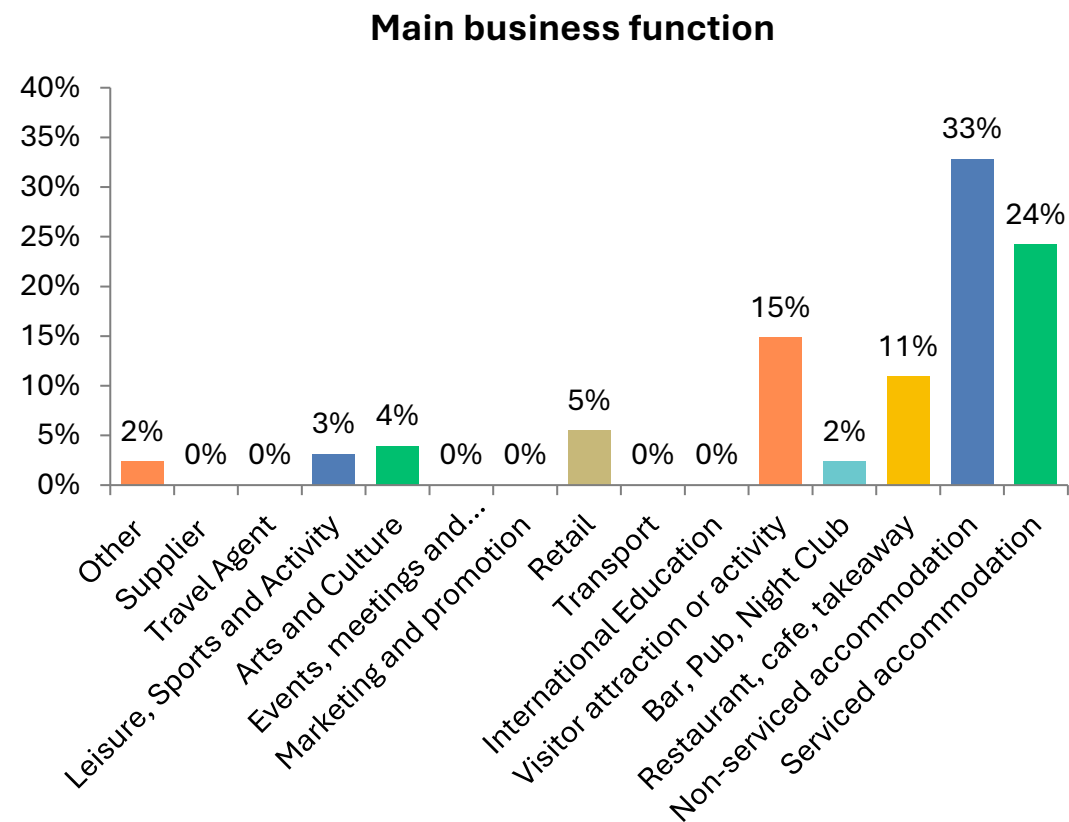
This wave reflects on performance since the start of 2025 and looking forward to summer 2025

## Key Headlines

- 55% of businesses are committed to growing and investing in their current business, just 13% plan to sell or retire in the next 2 years.
- **Business Performance in 2025 (so far)** - 85% reported increased costs, 63% saw reduced profits, Visitor spend is **net down by 18 points** compared to 2024.
- **Only 44%** of businesses are at least somewhat confident about the next 6 months of trading, 31% are not confident.
- Top concerns: rising costs (79%), economic climate (76%), and seasonality (58%).
- 44% of businesses have reduced staff due to National Insurance and wage increases, 38% are doing more hands-on work themselves, 34% have a recruitment freeze.
- 63% of coastal tourism businesses plan to increase prices.
- **Top 3 priorities:** Reducing costs (94%), Increasing year-round business (89%), and improving sustainability (81%). Though more businesses state that increasing year round business has now become very important.
- Summer 2025 bookings are **lower** than last year.
- **Visitor Targeting - UK stay visitors (80%)** are the top priority, though there is a growing focus on **European visitors (63%)**.
- 76% of businesses want more investment in destination marketing.
- There is a high interest in training for **digital marketing (57%)**, **sales (55%)**, and **AI use (40%)**.

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## About respondents

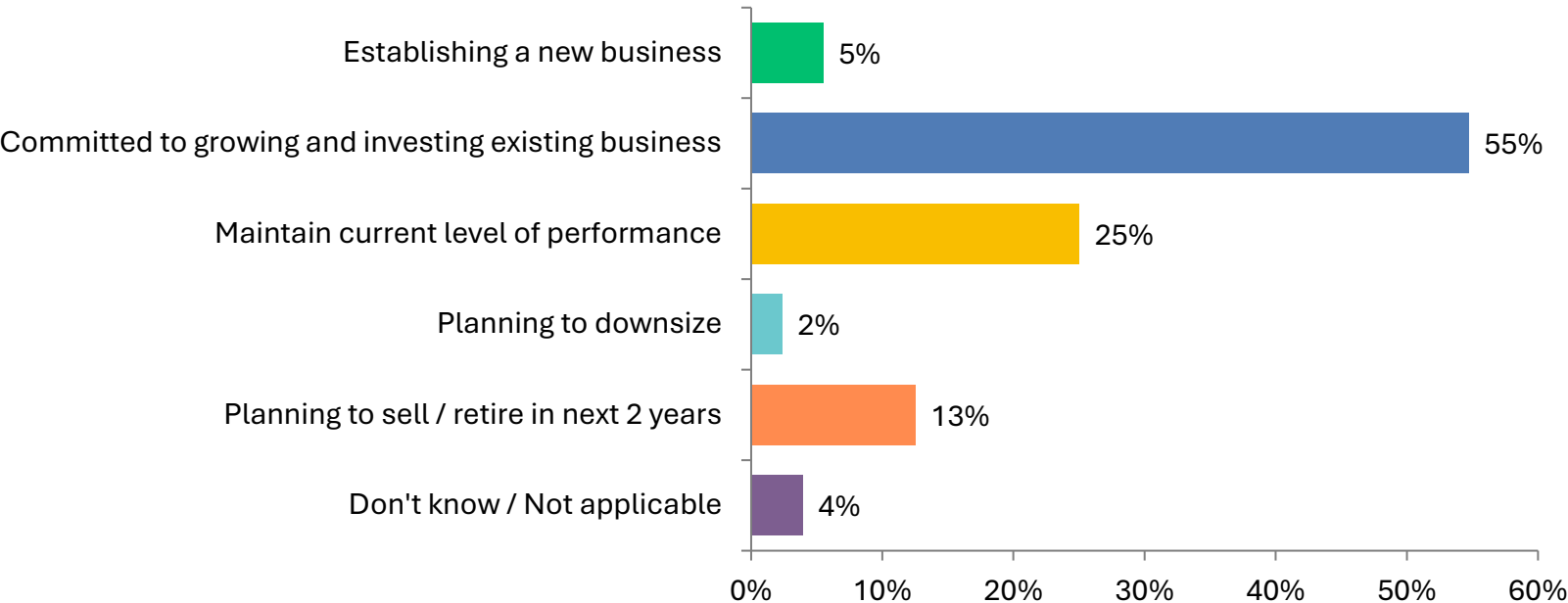


88% of businesses stated that they are independently owned, 1% are part of a local or regional chain, 2% part of a national chain and 9% part of a charity or not-for-profit organisation

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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 (55%), A quarter (25%) are trying to maintain current performance and 13% planning to sell or retire in the next 2 years.



These results are similar to previous waves.

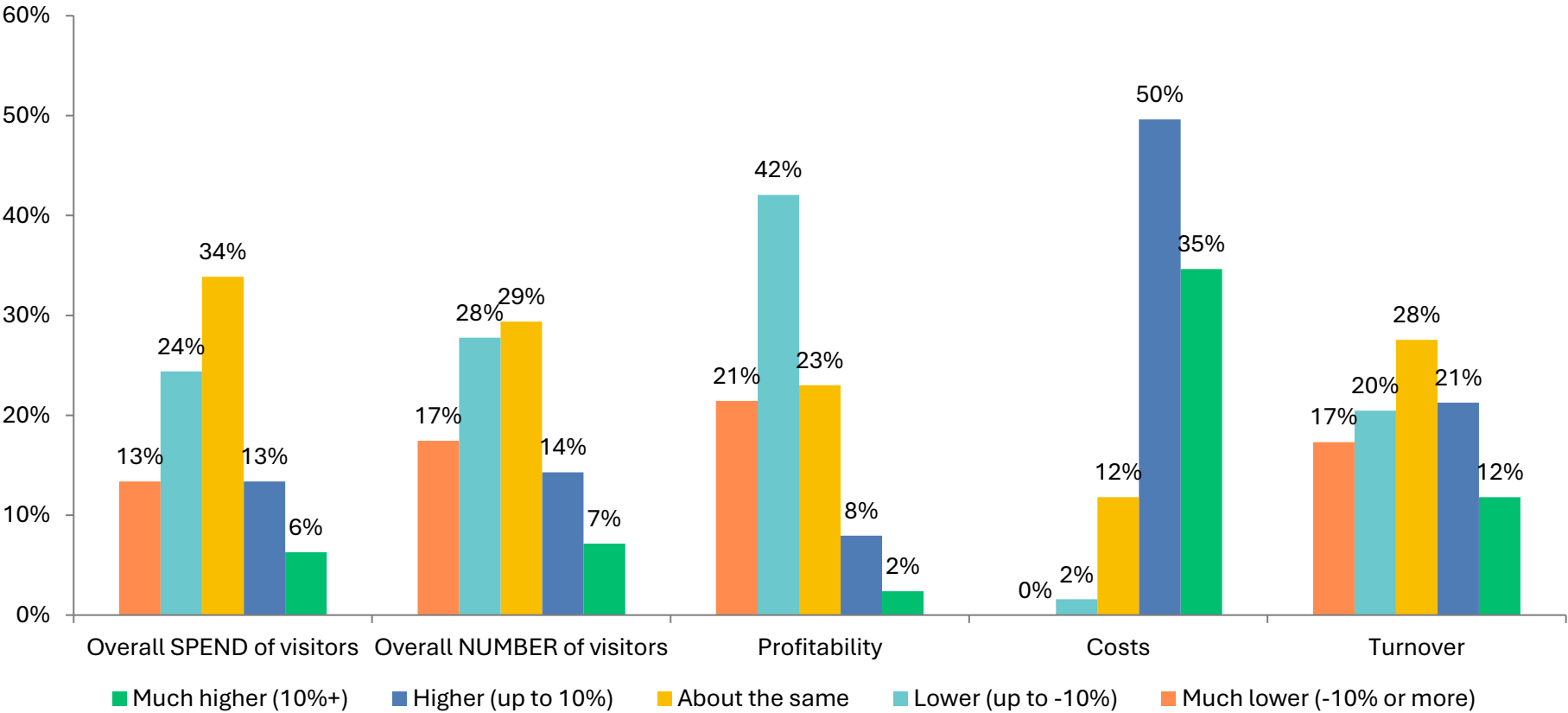
The number looking to sell or retire in the next 2 years is significantly below pre-covid levels.

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## Business performance so far in 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 (85%) which meant that majority of businesses showed a reduction in profit (63%).

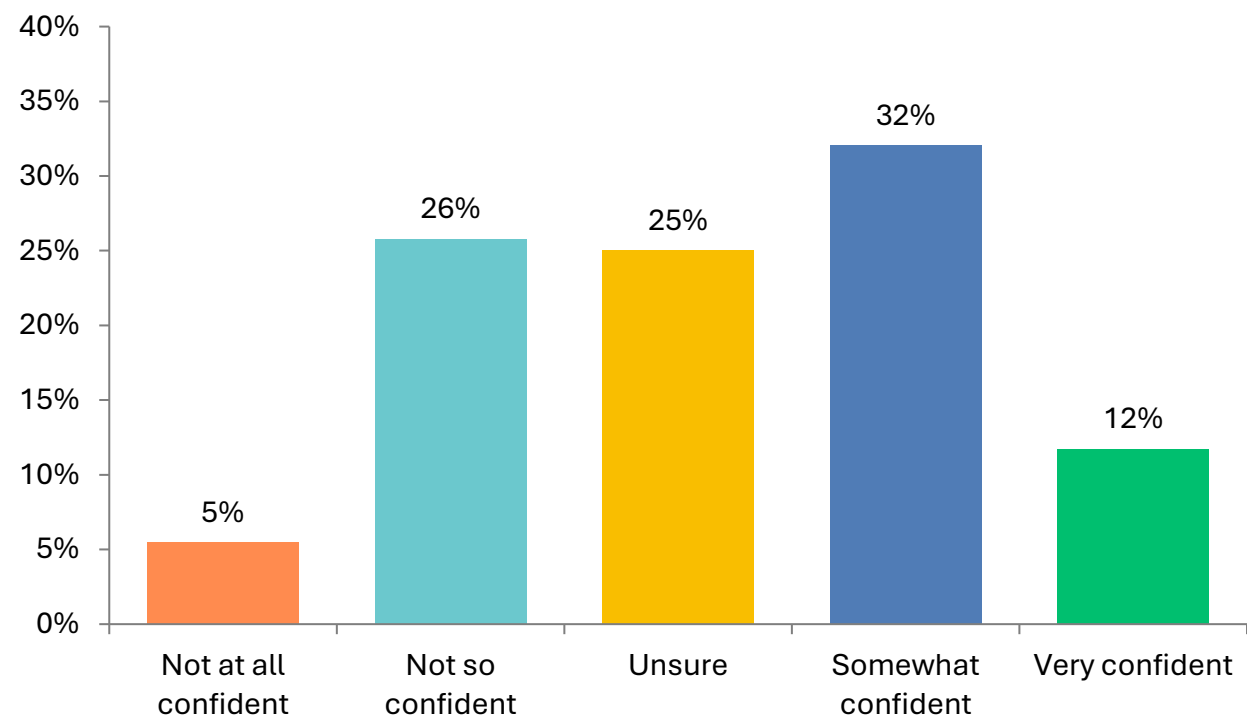
There are more businesses that state overall visitor spend is down so far this year than up (net -18 pts).



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## Business Confidence

How confident do you feel about your business trading over the next 6 months (to end December 2025)?



Confidence is similar to previous waves – with 44% of businesses at least somewhat confident about the next 6 months of trading and 31% not confident.

**Top external impacts:**

- Increasing costs 79%
- Economic climate 76%
- Seasonality of the destination 58%
- Poor / unpredictable weather 41%
- Competition from other local businesses 38%

**Other notable responses:**

- Increase in water bills 32%
- VAT threshold 29%
- Competition from overseas holidays 27%
- Water quality 10%

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## UK Government - Budget impact

In this wave we asked businesses what the impact has been on their business as a result of the rise in National Insurance and other announcements in the UK Government Budget (October 2024).

**For those businesses that employ staff 44% have reduced the number of staff they are employing, more than a third (38%) are getting more hands on in the business themselves and initiated a recruitment freeze (34%).**

**Of note 11% are using more volunteers in the business and 5% increasing the number of apprentices.**

Responses under “other” include not providing any pay increase, reducing the number of staff under 21 years of age, Directors taking on more hours.

What impact has the increase in National Insurance contributions and/or increase in minimum wage had on your business?	
Reduced number of staff employed	44%
Undertaking more hands-on tasks myself now	38%
Recruitment freeze	34%
Changed employment terms (e.g reduced min hours contracted, shorter days)	27%
Other	15%
Increased number of seasonal staff	13%
None of the above	12%
Increased use of volunteers	11%
Increased number of apprentices	5%
Increased number of full-time permanent staff	2%

Reduced number of staff employed	44%
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## Responding to increasing costs and pressures

Businesses were asked how they plan to respond to the increasing costs and pressures that are facing their business.

The majority (63%) said that they plan to increase their pricing

### **Price changes:**

53% of businesses increasing prices by up to 10%  
10% increasing prices by more than 10%  
25% retaining same pricing  
5% have reduced their pricing  
5% unsure / still considering options

### **Staff recruitment:**

**About 50% of businesses that employ staff are currently recruiting staff.**

For those that were recruiting staff:

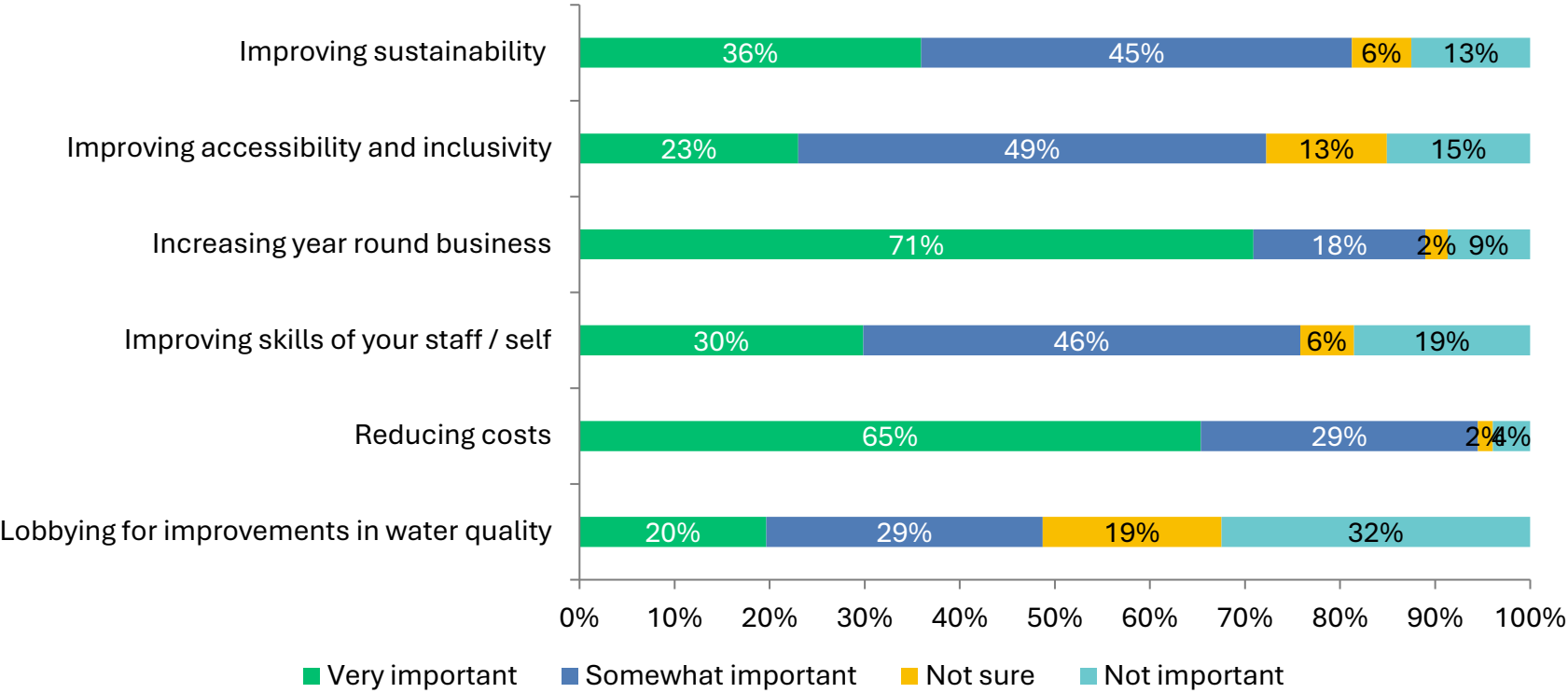
- 16% say they are having no issues recruiting the right people
- 26% are struggling to fill certain types of roles
- 18% are struggling to fill seasonal vacancies
- 17% are struggling to fill permanent / year round vacancies.



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## Business priorities

How important are the following to your business at the present time?



**Top priorities:**

- #1 Reducing costs 94%
- #1 Increasing year round business 89%
- #3 Improving sustainability 81%
- #4 increasing skills 76%
- #5 improving accessibility and inclusivity 72%

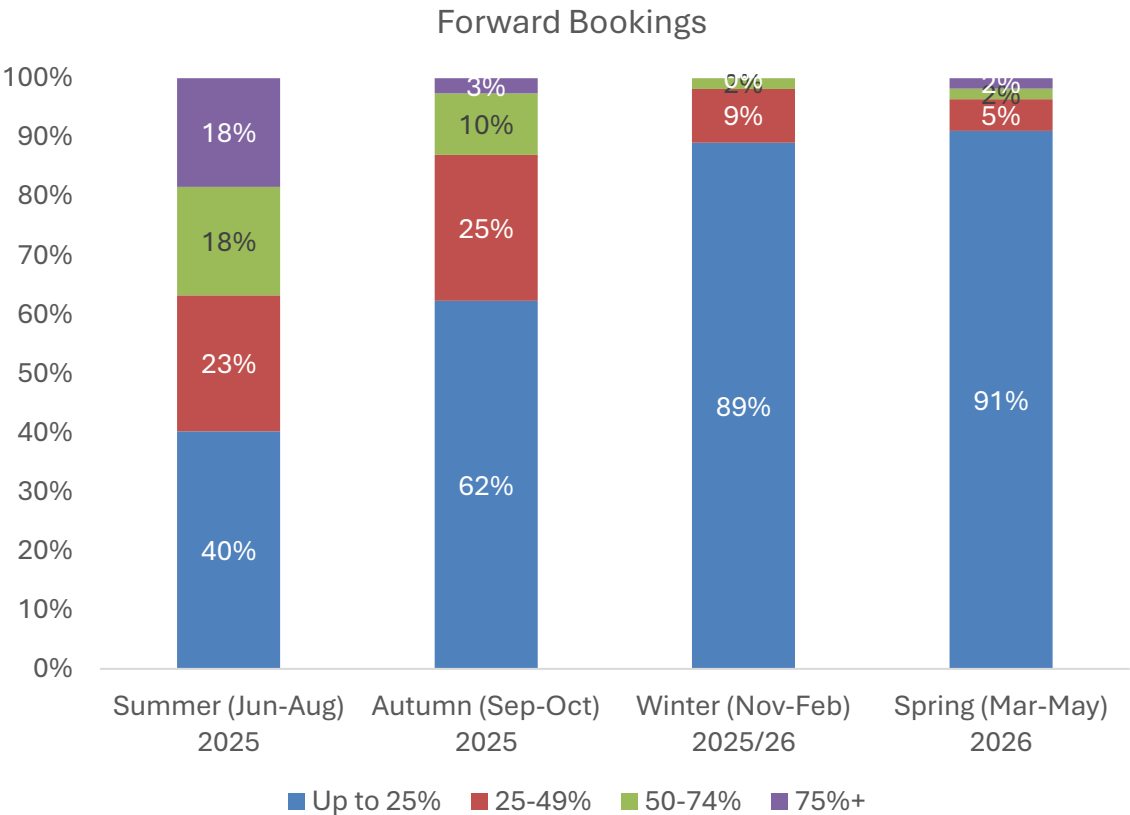
**Improving year round business** has seen a significant increase in businesses stating it is **very important**, but overall Reducing costs is still the top priority for almost all businesses.

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## Forward bookings

Forward bookings are lower than the same period last year for Summer, but Autumn, Winter and Spring 26 are similar

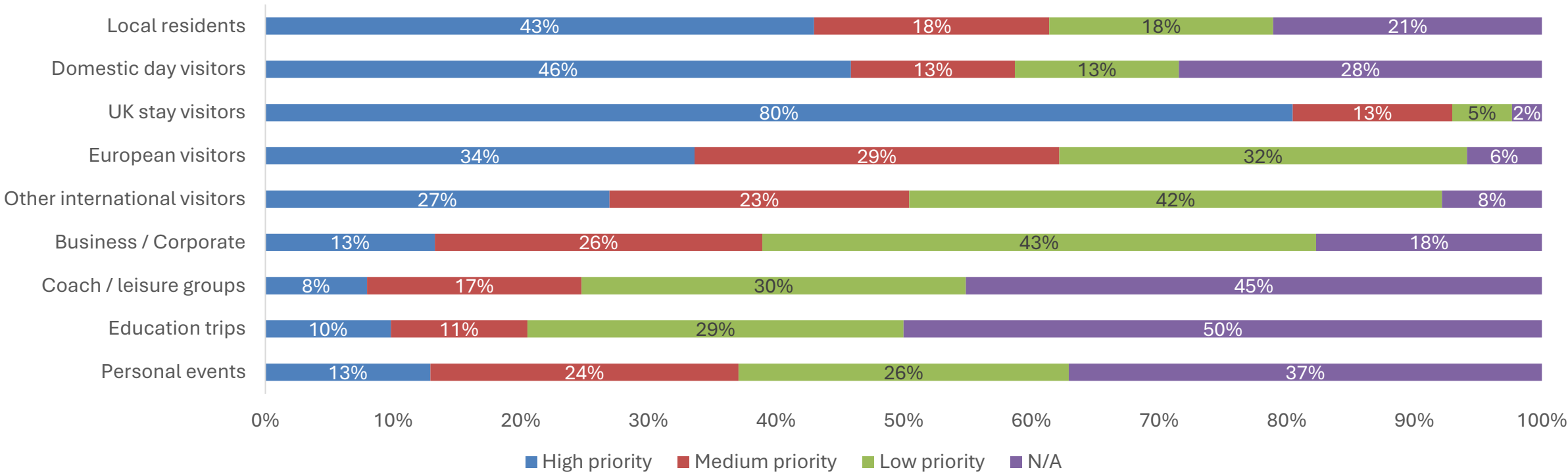
A significant number of businesses still have a lot of capacity to sell for summer 2025.



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## Visitor types

The key markets businesses are targeting in 2025 are UK staying visitors (80% high priority), European visitors (63% high and medium priority) and local residents (61% high and medium priority). This recognises an ongoing growth in focus on European visitors year on year.



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## Business support

When asked what non-fiscal support businesses would most like to see, there has been a big increase in the number of businesses who would like to see a **greater investment in destination marketing** (76% +9pts).

### What non-fiscal measures would help your business most?

- Greater investment in destination marketing (76%)
- Business support to improve the efficiency / reduce costs in your business (46%)
- Business support to maximise sales opportunities and revenue (46%)
- Reduction in storm overflows (30%)
- Improvements in water quality (26%)

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

- |                                     |          |
|-------------------------------------|----------|
| • Digital marketing                 | 57%      |
| • Increasing sales                  | 55% (+6) |
| • Using AI in your business         | 40% (+6) |
| • Research and latest trends        | 36% (+3) |
| • Innovation to lower costs         | 34% (-2) |
| • Sustainability                    | 29% (+1) |
| • Product or experience development | 22% (+3) |
| • Management                        | 18% (-1) |
| • Customer service                  | 16% (-7) |
| • Accessibility                     | 12% (-1) |



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