

Coastal tourism

pre-COVID-19



Great Britain

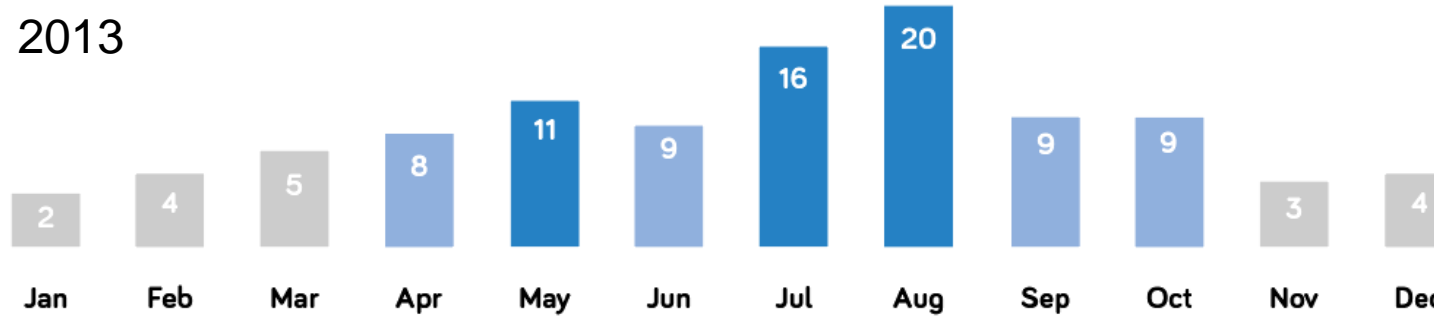
- **£17.1bn tourism spend**
 - 27m overnight visits, 217m day visits
 - 285k tourism related jobs supported
-

England

- **£13.7bn tourism spend**
 - 21m overnight visits, 169m day visits
 - 210k tourism related jobs supported
-

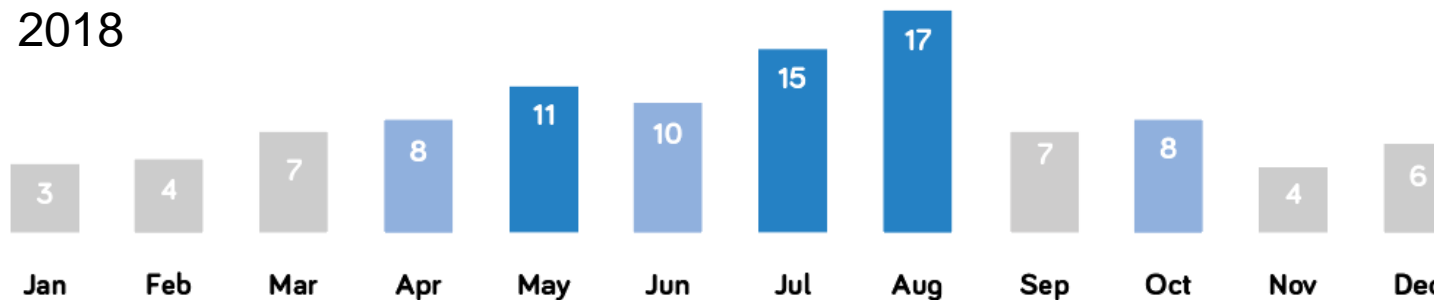
- 10% of all **international** visitors that arrive in UK go to coast
- Very high rate of **SMEs** (less than 3% corporate representation)

Seasonality on coast



Seasonality was changing but it takes time...

Jul-Aug dependency decreased from 36% to 31.9% (compared to 23.1% of all domestic)
But 29% of businesses generate more than half their turnover in this period, 75% of businesses 25%+
Mar-Oct decreased from 87% to 83.6% (compared to 71% across all domestic)



Coastal Tourism challenges

Pre-Covid-19

Seasonality

- Productivity
- Investment
- Perceptions (consumers, media and government)

Climate Change – coastal storms / flooding

Business ownership and investment

- Large number of micro and small businesses – difficult to coordinate and deliver change
- 28% planning to sell / retire in next 5 years

High dependency on Tourism average 15-20% of employment - but 50%+ in places like St. Ives, Exmoor, Whitby and Newquay

Socio-economic pressures on Coastal Communities

Skills

Brexit

But there are opportunities...

Off peak growth markets

- International visitors
- Domestic visitors

Wellness, Business Events, Under 35s, Empty nesters (over 55s) and Active Experiences

Wider sector or coastal opportunities...

- England Coast Path
- Tourism Sector Deal

Updated forecast - Impact of COVID-19

Pre-COVID spend £13.7bn in England and £17.1bn GB

GB – coastal impact of COVID-19

Based on July re-opening, loss of international travel and reduced capacity due to social distancing, November lockdown

- £10.23bn loss in tourism spend
- 136m trips and day visits
- circa 179,000 jobs

England – coastal impact of COVID-19

Based on July re-opening, loss of international travel and reduced capacity due to social distancing, November lockdown

- £8.27bn loss in tourism spend
- 110m trips and day visits
- circa 145,000 jobs



Impact of COVID-19

- 7% of businesses permanently closed
- Three quarters of businesses are open at less than 75% capacity
- 16.6% planning to open longer into season, offset by 12.5% reducing their season

Loss of –

- Events programme
- International Education
- Coach Groups
- Business Events and conferencing (Bournemouth, Brighton, Blackpool, Torquay)
- Cruise (Dover, Southampton, Portland, Poole, Plymouth)
- Significant proportion of the Night-Time Economy

Initial easing of restrictions led to large volumes of day visitors – new audiences - issues with litter, behavior, water safety, parking

Media images of overcrowded beaches damaged confidence



Impact of COVID-19

NCTA Business Survey (October 2020)



National Survey of coastal businesses (5-18 October)

- 43% of coastal tourism businesses say Government schemes to date have made a significant difference
- 68.4% of businesses feel ongoing Government support will make “a significant difference between survival & collapse” and the support they would like is grants (66%), Business Rate Relief (51%), VAT extension (33%) and SEISS (33%)
- 62.5% state it will take more than a year before they can return to a profit
- **33.8% of businesses are unsure about their survival until March 2021**
- 30.5% of businesses have reduced their staffing levels, 5.2% have increased their staffing

60% planning to rethink their product of marketing proposition to aid recovery
– most considering new audiences (45%) or creating new experiences (33%)

Impact of COVID-19

Wider evidence of coastal impact

Hotel Solutions (May 20 report) forecast 20-25% of accommodation in coastal communities will close

Institute of Fiscal Studies - there “is no longer a north-south, or urban-rural divide... coastal areas are notably vulnerable to both the health and economic impacts of the crisis” – especially Isle of Wight, Torquay, Blackpool, **Dorset** and Northumberland

Reports highlighting impact on coast - Institute for Fiscal Studies, Centre for Towns, the Institute of Employment Studies, Social Markets Foundation, Hotel Solutions, the Hope not HATE Charitable Trust, Social Investment Business and Place Bureau.

NCTA have written to Chancellor and Tourism Minister requesting support for 3-year Coastal Tourism Recovery programme

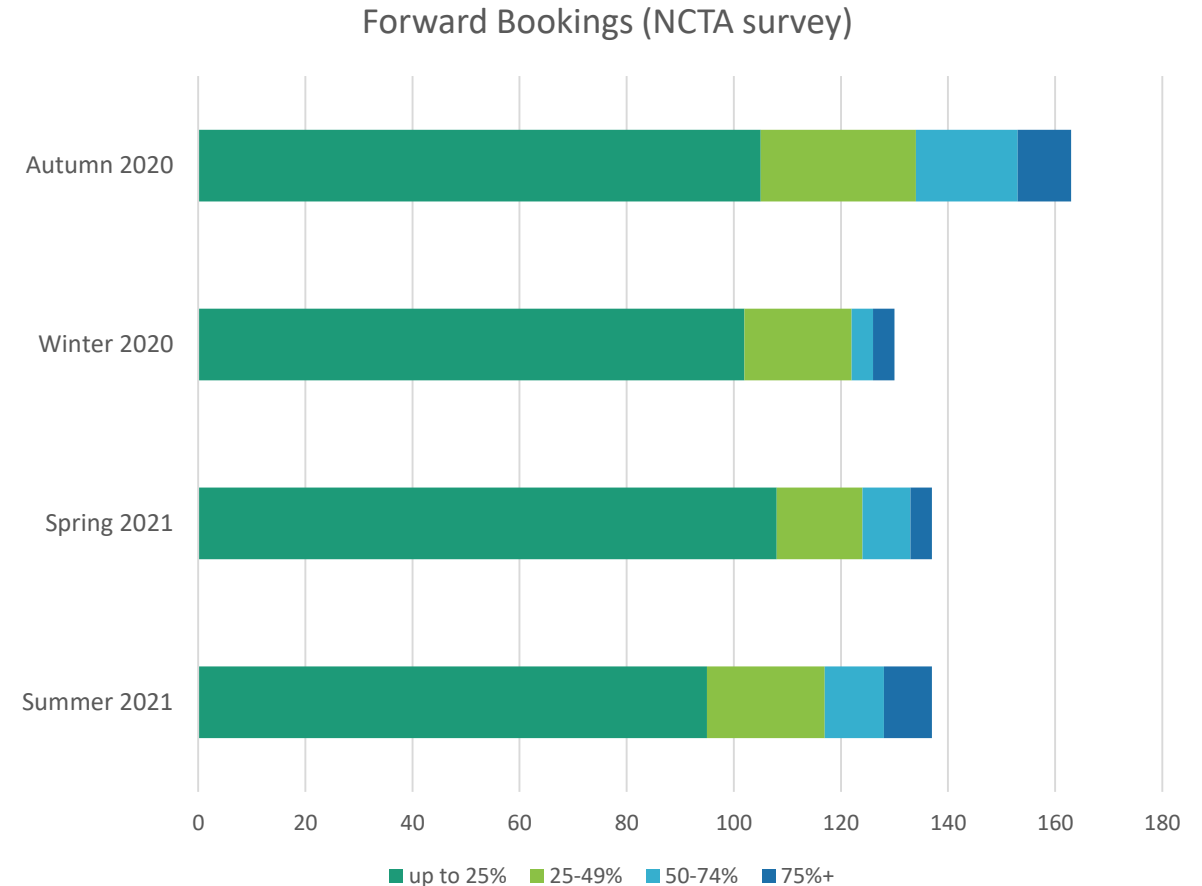


Consumer research and trends

Consumer confidence is fragile* –

- 58% think normality won't return until at least summer 2021
- Although coast was top choice for summer breaks, seaside is currently third choice for winter breaks (after cities and countryside at 25%) and rural coast a consistent 4th choice option (19%)
- City breaks performed better than anticipated in September and coast lower than expected – reasons cited for change of destination choice – concerns too many people (36%), accommodation too expensive (32%), welcome from locals (13%)
- 13% of consumers plan to take more UK breaks over rest of this year, 43% are taking fewer.
- Still large numbers expecting to take break but not yet booked even for October

* VisitEngland consumer tracker <https://www.visitbritain.org/covid-19-consumer-sentiment-tracker>



Recovery and reimagine

This is the opportunity to really tackle seasonality and Build back better

Need government investment in recovery programme of support until at least 2023-24 to get economy back to pre-COVID levels

NCTA has developed programme backed by 15 cross-party MPs it includes

- Programme of support targeted at small and micro businesses
- Product development and marketing to address seasonality and kick-start economic and environmental recovery
- Share best practice and lessons learnt to support recovery and build resilience
- Complements the wider three-year recovery programme that replaces Year of Coast originally scheduled for 2021

Request sent to Chancellor and submitted to Comprehensive Spending Review asking for £1.55m to cover 3 year programme

For further details see <https://coastaltourismacademy.co.uk/resource-hub/resource/coastal-tourism-recovery-funding-letter-to-the-chancellor>

Reports and data referenced:

- Institute for Fiscal Studies, The Geography of the COVID-19 Crisis in England report 2020 <https://www.ifs.org.uk/uploads/The-Geography-of-the-COVID19-crisis-in-England-final.pdf> report
- Centre for Towns, The Effect of the COVID-19 Pandemic on our Towns and Cities report 2020 <https://www.centrefortowns.org/reports/covid-19-and-our-towns/viewdocument/21>
- Institute for Employment Studies, Labour Market Statistics June 2020: IES Analysis <https://www.employment-studies.co.uk/resource/labour-market-statistics-june-2020-ies-analysis>
- Social Markets Foundation report <https://www.smf.co.uk/wp-content/uploads/2019/08/Falling-off-a-cliff-1.pdf>
- Hotel Solutions, From Survival to Recovery report 2020 <http://www.hotelsolutions.org.uk/wp-content/uploads/FROM-SURVIVAL-TO-RECOVERY.pdf>
- HOPE not hate Charitable Trust, Understanding Community Resilience in Our Towns report 2020 <https://www.hopenothate.org.uk/wp-content/uploads/2020/08/v6-towns-report-2020-08-v6.pdf>
- Social Investment Business <https://sibgroup.org.uk/resources/covid-19-coastal-communities-investing-social-economy-revive-seaside-resorts-and-coastal>
- Place Bureau report <https://www.theplacebureau.com/insight/new-wave-dispatch-release/>
- VisitEngland consumer tracker <https://www.visitbritain.org/covid-19-consumer-sentiment-tracker>

National Coastal Tourism Academy

About us

Leading organisation on Coastal Tourism – understand coastal issues, opportunities for growth and how to overcome challenges that are exaggerated on the coast

- ✓ Supporting industry
- ✓ Bridging gaps in coastal tourism research
- ✓ Sharing lessons learnt and best practice
- ✓ Development projects to make change happen
- ✓ Vision, leadership and advocacy for coast

Lead international marketing on the whole of England's Coast
Funded by commercial income and project activity
Bring together Government, Industry and Academia

Addressing seasonality

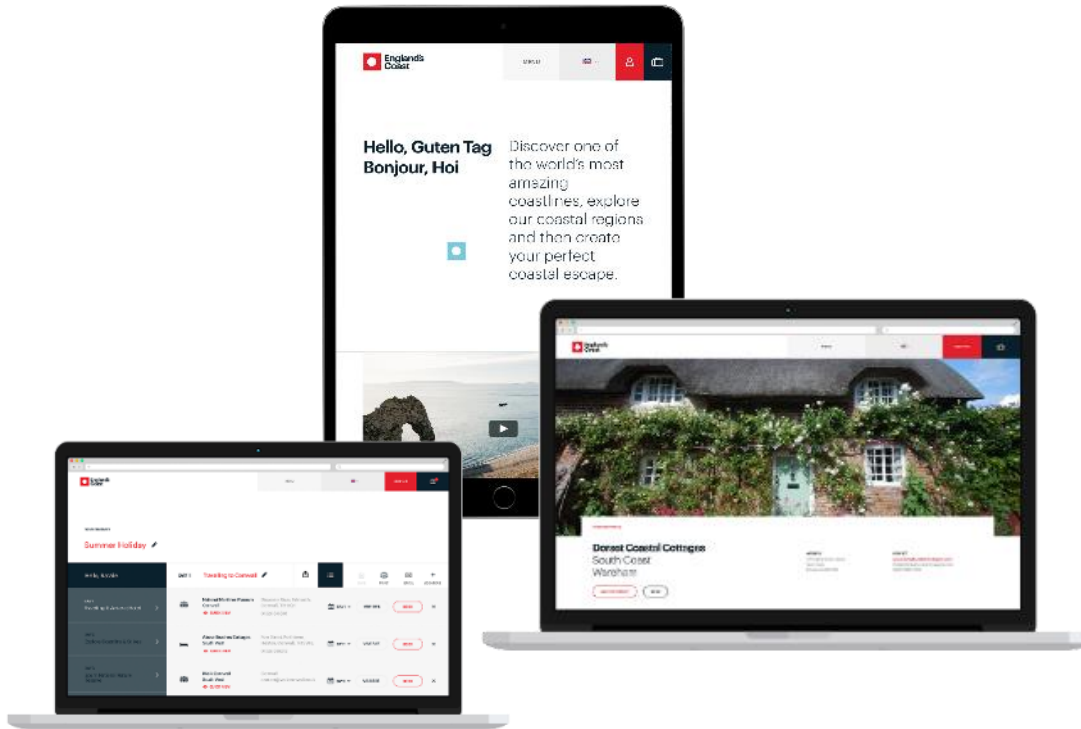
Economic Growth

Best practice

Leadership

England's Coast

www.englishcoast.com



Discover England Fund project showcasing the entire coast of England with holiday inspiration and itinerary builder featuring almost 2,000 businesses

Focussed on **Germany, the Netherlands, France, Spain and Italy**

- Couples 40+ travelling without children
- Off-peak and shoulder periods

Now being used as key resource for domestic visitors

Over 55k followers across all social media sites and growing, content in all languages on Facebook [EN](#), [DE](#), [NL](#), [FR](#), [ES](#) and [IT](#).

Activity has included PR, Media, digital and social activity for consumers and travel trade, business support and online training for SMEs. Generating £22m+ of media coverage and increasing number of visitors to the coast from across Europe