

Shore Potential: Connecting the past with the future

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Samantha Richardson
Academy Director

Introduction

Background and introduction

Coastal Communities Fund project

Set up to understand the nature of coastal tourism and identify opportunities for growth.

- ✓ Improving the visitor experience
- ✓ Supporting industry
- ✓ Bridging gaps in coastal tourism research
- ✓ Sharing lessons learnt and best practice

Working with industry, academia and the public sector

Job creation

Economic Growth

Best practice

Resource Hub

Coastal tourism

A growing industry with untapped potential



- £8bn domestic overnight and day trip spend
 - 15% of all international visitors go to coast (c.1.8 million)
 - 210,000 jobs valued at £3.6bn (1% growth)
 - Very high rate of SMEs (less than 3% corporate representation)
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- Pace of change is slow on coast
 - Growing industry but not as fast as visitor economy nationally
 - Perception issue

Reducing seasonality

Little change since 2008



Off peak growth markets

- Health and Wellness
- Business Events
- Under 35s:
 - pre-family
 - Young families
- Empty nesters (over 55s)
- Active Experiences

Other growth opportunities

- Challenging perceptions
- Open for business year round
- Encouraging more local and regional visitors in winter

Perception

How do we change perceptions that the coast is open year round?



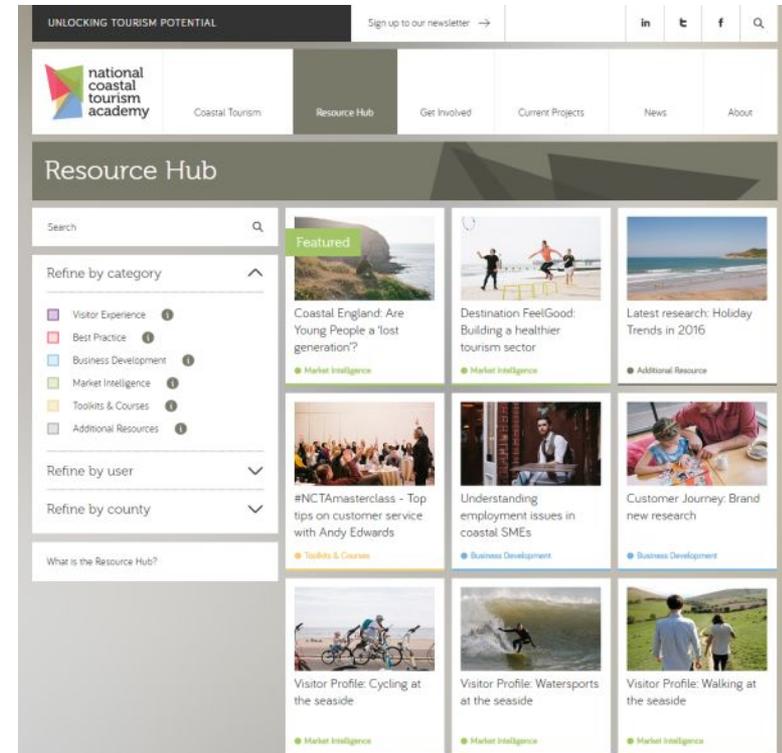
Resource hub

Online resource for industry

Sharing:

- Best practice
- Market intelligence
- Product development guides
- Toolkits
- Courses
- Case studies and lessons learnt

Predominantly NCTA resources but also links to .gov business support, VisitEngland and other resources



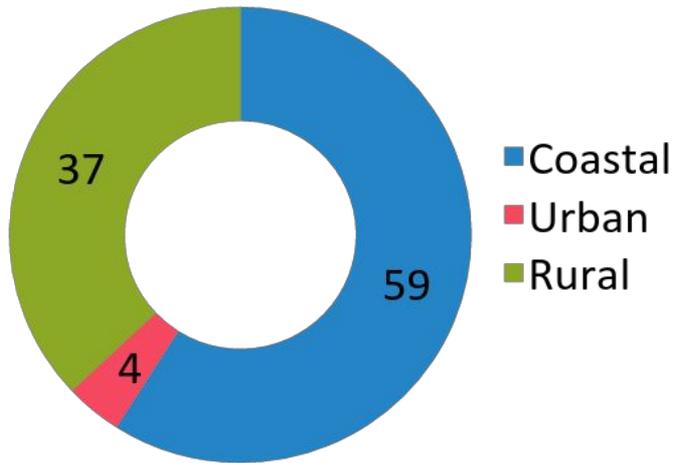
The screenshot shows the 'Resource Hub' page of the National Coastal Tourism Academy. The page features a navigation bar with the academy's logo and menu items: Coastal Tourism, Resource Hub (selected), Get Involved, Current Projects, News, and About. A search bar is located at the top left. Below the search bar, there are filters for 'Refine by category' (Visitor Experience, Best Practice, Business Development, Market Intelligence, Toolkits & Courses, Additional Resources) and 'Refine by user' and 'Refine by county'. The main content area is titled 'Resource Hub' and displays a grid of featured resources. The 'Featured' section includes: 'Coastal England: Are Young People a 'lost generation?' (Market Intelligence), 'Destination FeelGood: Building a healthier tourism sector' (Market Intelligence), and 'Latest research: Holiday Trends in 2016' (Additional Resource). Below this, there are three more featured items: '#NCTAmasterclass - Top tips on customer service with Andy Edwards' (Toolkits & Courses), 'Understanding employment issues in coastal SMEs' (Business Development), and 'Customer Journey: Brand new research' (Business Development). At the bottom, there are three visitor profile resources: 'Visitor Profile: Cycling at the seaside' (Market Intelligence), 'Visitor Profile: Watersports at the seaside' (Market Intelligence), and 'Visitor Profile: Walking at the seaside' (Market Intelligence).

Opportunities for Growth

Wellness Tourism

1 in 5 have taken a wellness holiday in last 12 months

Preferred Setting



Yet only 8% currently visiting coast for a wellness break



Wellness Tourism

Six pillars of wellness



CULTURAL



**PHYSICALLY
ACTIVE**



**ACTIVE
OUTDOORS**



SPIRITUAL



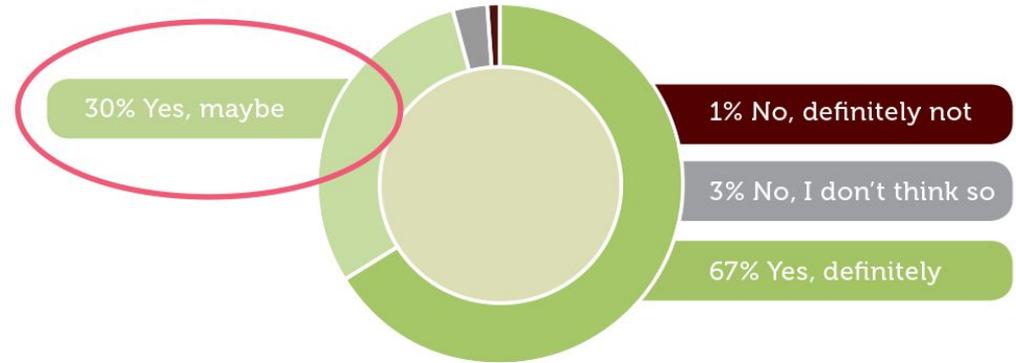
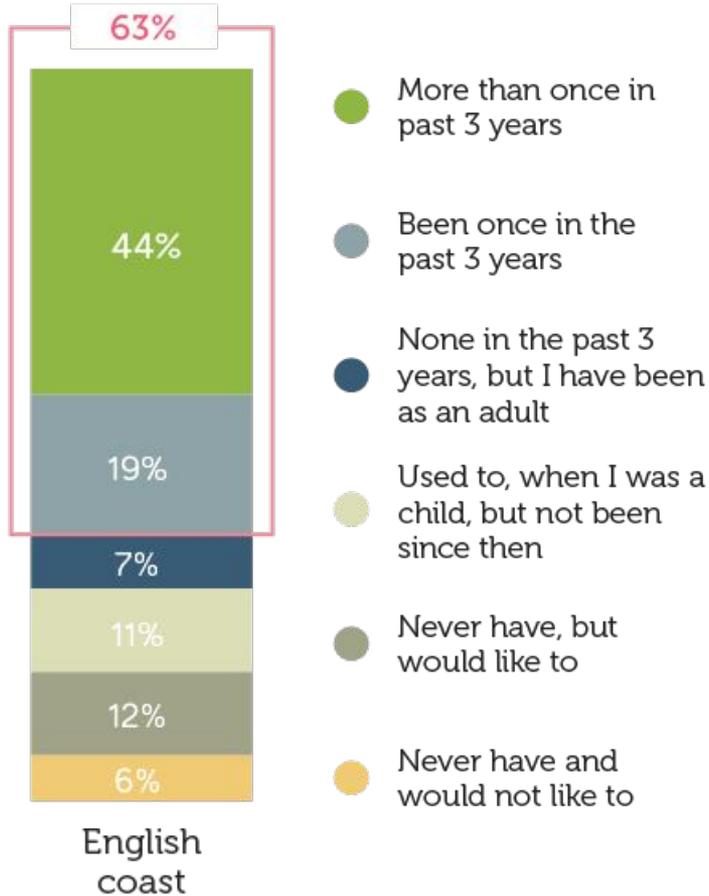
**LEARNING &
DEVELOPMENT**

SPA

**SPA &
BEAUTY**

Under 35s

Unaware of coast's offer



Under 35s

Unaware of coast's offer

The Coastal Experience is considered a very British one

- The coast feels quintessentially British (more so than cities)
- Linked to nostalgia
- The shared British experience
- On one hand, culturally this can be too 'easy' vs abroad which is more challenging / interesting
- But also on another culturally interesting and profound...to connect to roots



It is important to feel that bit of Britishness occasionally.

The coast it is like the original Britain. One that perhaps is becoming extinct.

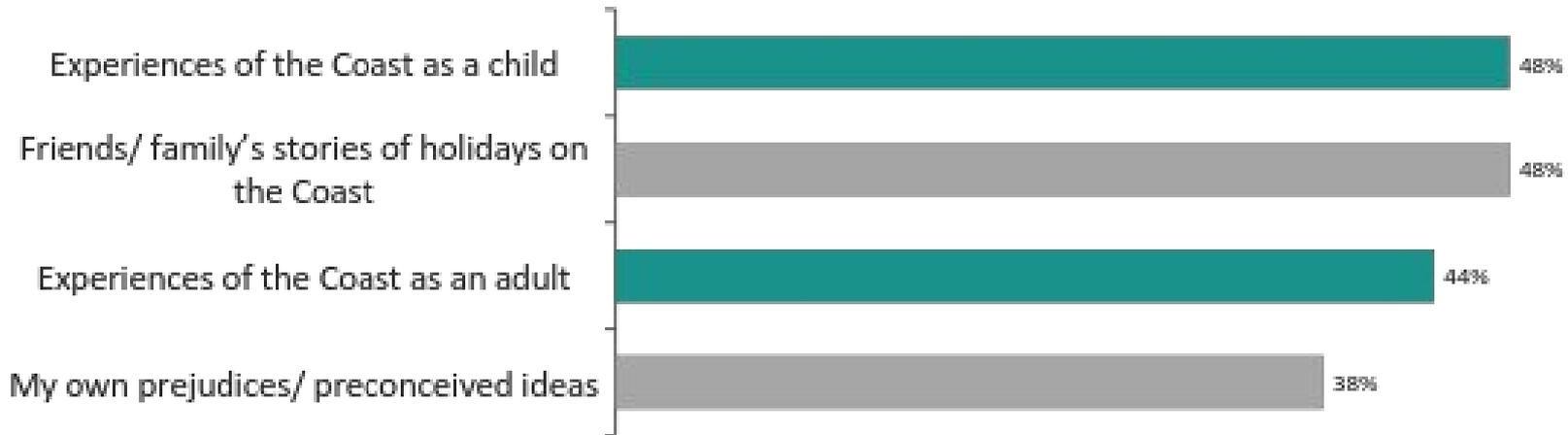
What can be more British than a pier! It is about connecting to our culture.

For some there is something valuable in the sense of shared heritage / culture that can be had at coast almost above other types of domestic destination

Under 35s

Unaware of coast's offer

Influences of perceptions & attitudes towards the English coast



Although social media has strong influence on decision making generally, it plays far less of a role in shaping attitudes towards the English coast... instead people are relying on their own or their friend's experiences to inform them.

Under 35s

Unaware of coast's offer



Brighton Pier

North Pier, Blackpool

69%
Influenced by
imagery seen on
social media

Nostalgia

Recollection of time shared with parents when younger

An Escape

Fresh air, change of scene reflection and relaxation

Fun

Doing traditional things, beach experience, bonding

Shared culture & heritage

A very British experience

Under 35s

Unaware of coast's offer

Top tier attractions Cornerstone of offer

58% Beaches	54% Fish & chips
45% Historical sites	44% Pubs
43% Coastal paths	40% Dramatic coastlines

Walking on beaches and eating fish and chips are the most appealing coastal attractions

Mid tier attractions To support top tier

38% Top restaurants	36% Funfairs & fairgrounds	34% Wildlife viewing
32% Arcades	32% Live music	31% Cinema on the beach

Lower tier attractions To be used to for specific audiences

28% Music festivals	26% Comedy shows	26% Spas/ health clubs
25% Clubs/ bars	22% Water sports	21% Art & culture
21% Cycling	19% Sports – tennis, golf, etc	15% Specific art happenings

Under 35s

Unaware of coast's offer

Quick wins:

- Beach holidays
- Romantic holidays
- Family holidays
- Ultra-short breaks (1nt)

Long term:

- Wellness
- Activity
- Unique experience

ELUSIVES

Never been but would like to

OR

Been as a child or adult but not in the past 3 years but would consider English coast as holiday destination

31%

ENJOYERS

Been to the English coast on holiday at least once in the past 3 years

AND

had a good (but not excellent) time

24%

ENTHUSIASTS

Been to the English coast on holiday twice or more in the past 3 years

AND

had an excellent time

AND

would *definitely* go to the English coast for another holiday

29%

Empty Nesters

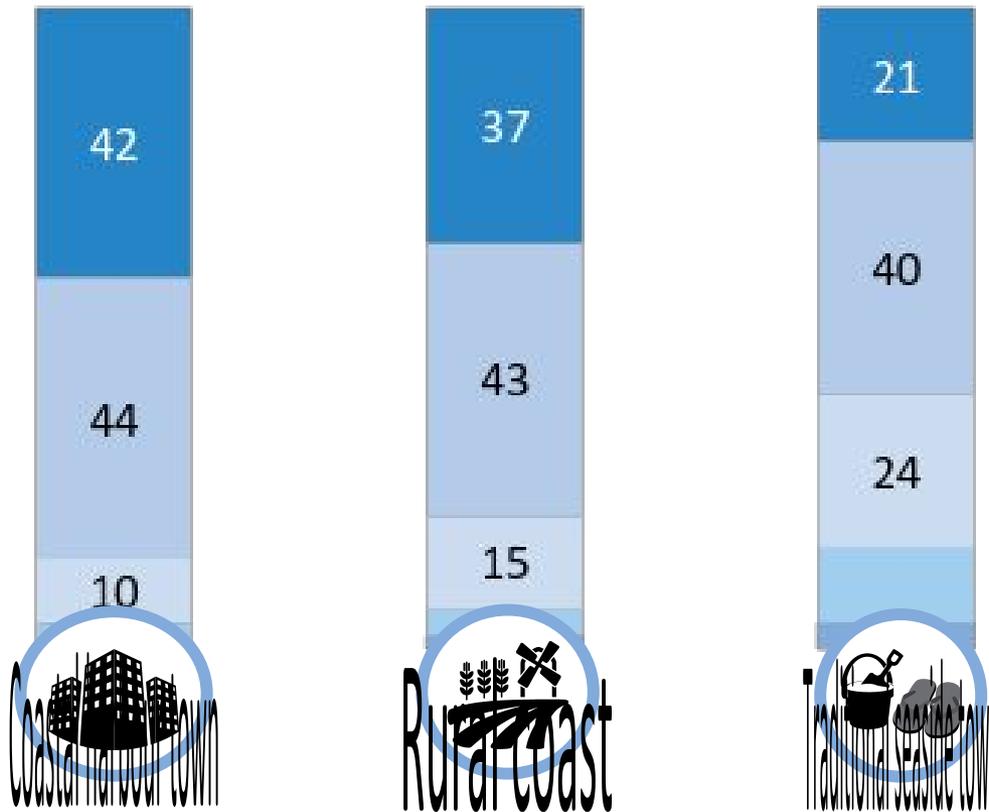
Key opportunity for shoulder season



- 1 in 2 over 55s
- Fastest growing - by 2024, over 55s will make up a third of UK population (22.6m)
- Majority appeal – taking it easy, local experiences, gentle walking and historic properties
- Six sub-segments interested in visiting coast off-peak

Empty Nesters

Key opportunity for shoulder season



Coastal destination preference

- Very unappealing
- Quite unappealing
- Neither appealing nor unappealing
- Quite appealing
- Very appealing

Empty nesters would generally prefer to visit a coastal harbour town for an off-peak holiday

Empty Nesters

Key opportunity for shoulder season

Reasons for visiting English Coast



Empty Nesters

Key opportunity for shoulder season

General thoughts on the English Coast

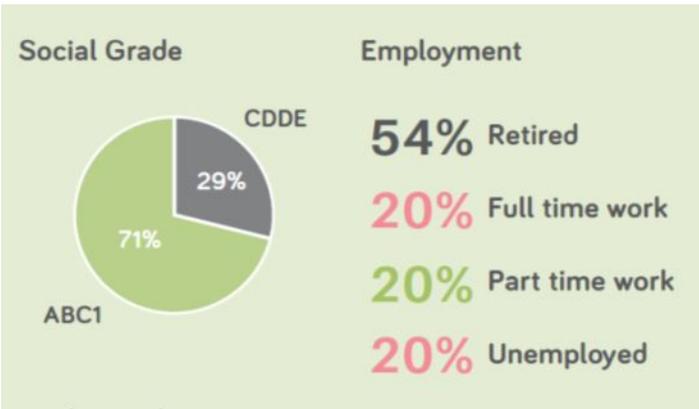


Empty Nesters

Key opportunity for shoulder season



What appeals to Coastal Enthusiasts?
 A coastal destination offering the ability to explore places of historical and cultural significance while at the same time allowing the ability to socialise and make new friends.



63% keen to explore history and heritage of destination
 81% believe coast is as wild and beautiful as other destinations in world
 76% think the English Coast can be just as good off-peak

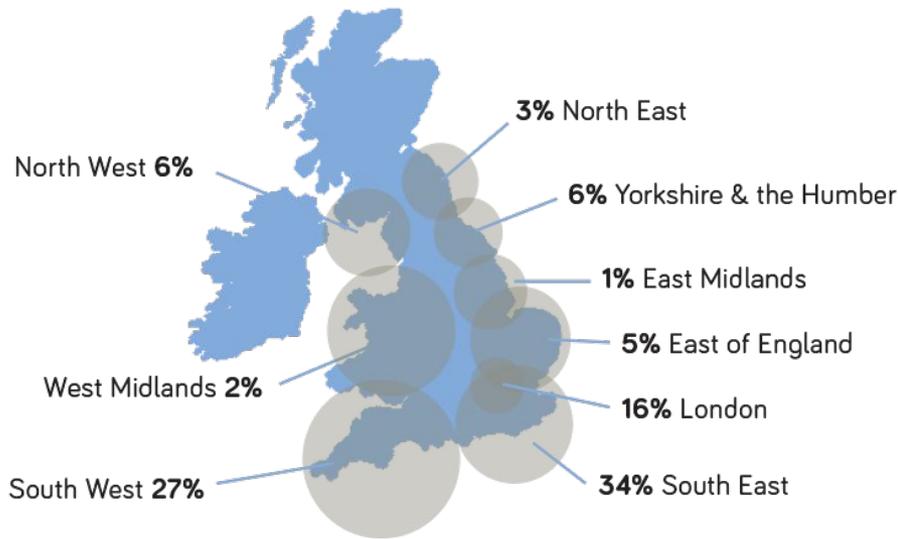
Key sources of information:

Recommendations from friends and relatives, Review sites and tourist board websites

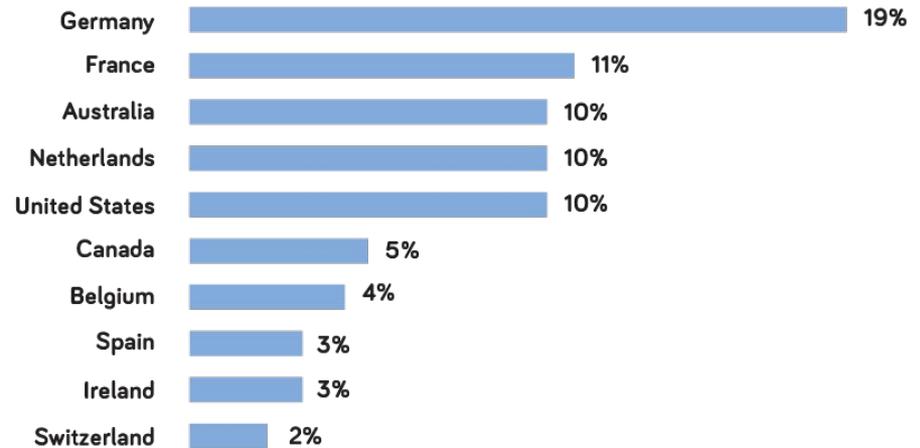
International Visitor

Are they interested in English Coast?

Breakdown of total England coastal visitors by region (%)



Proportion of all visitors to the coast, ranked by market (2011)



Only 15% of all international visitors go to the English coast at some point during their visit to the UK

Awareness of the coastal product is significantly lacking

International Visitor

Are they interested in English Coast?



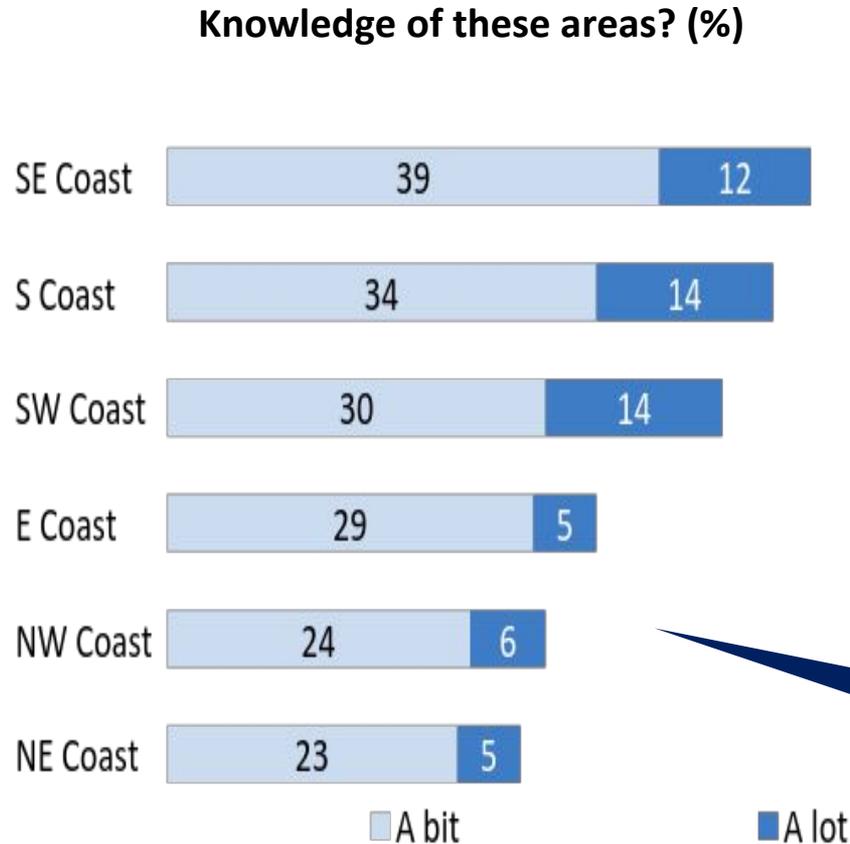
- Coast is least known aspect of British product to international visitors
- Visit to coast most likely to be combined with a visit to a capital city or a historic British city

Are they not interested in coast or simply unaware??

- Discover England Fund pilot project on East Coast of England with Dutch market

Dutch Visitor

Pilot project with East Coast



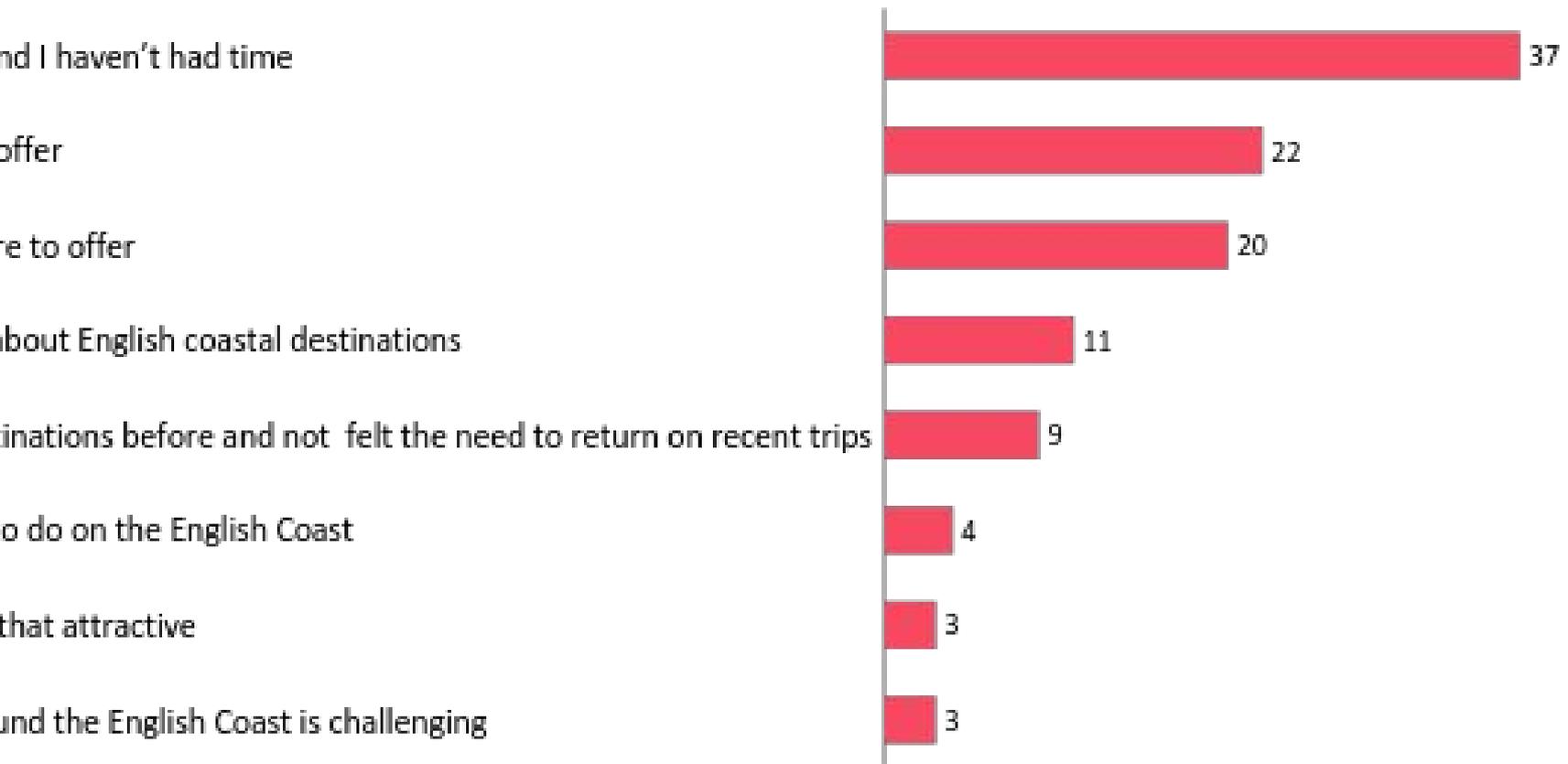
- Building understanding of Dutch consumer and the coast
- Undertook research in Holland November 2016
- Trial new product for the Dutch consumer focused on East Coast “Coastal Pass”

13% know nothing about any area of the English Coast

Dutch Visitor

Pilot project on East Coast

Why have you not explored any coastal destinations when holidaying in England? (%)

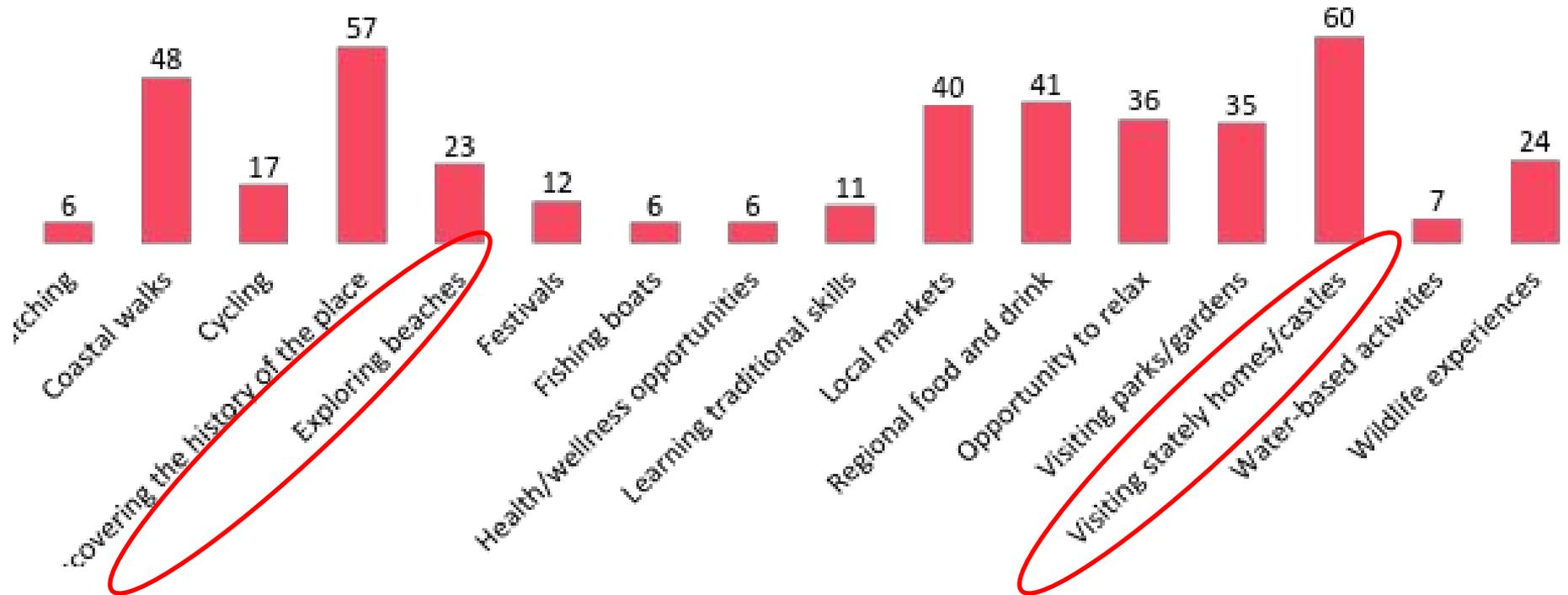


Dutch Visitor

Pilot project on East Coast

Think about what you like to do on holiday.

Which of the following would most encourage you to consider exploring the East Coast of England? (%)



What is Coastal Pass?

A cutting-edge booking and marketing tool that brings inspiration into life through interactive videos. Marketed for international travellers but perfect for the domestic market, visitors can create their own personalised itineraries to explore and discover the Coast of England.

Explore the East Coast of England



Focused on East Coast of England

- Hull to Harwich (inc Hull & E Yorks, Lincolnshire, Norfolk, Suffolk and Essex)

Using ferry routes of Hull and Harwich into Holland to target Dutch consumers

- over 55s travelling in shoulder and off-peak periods without children

Sample three- and five-day themed **coastal breaks**

The Pass features six thematic itineraries



Highlights / Must Sees



Nature and Wildlife



Coastal Heritage



Active Outdoors

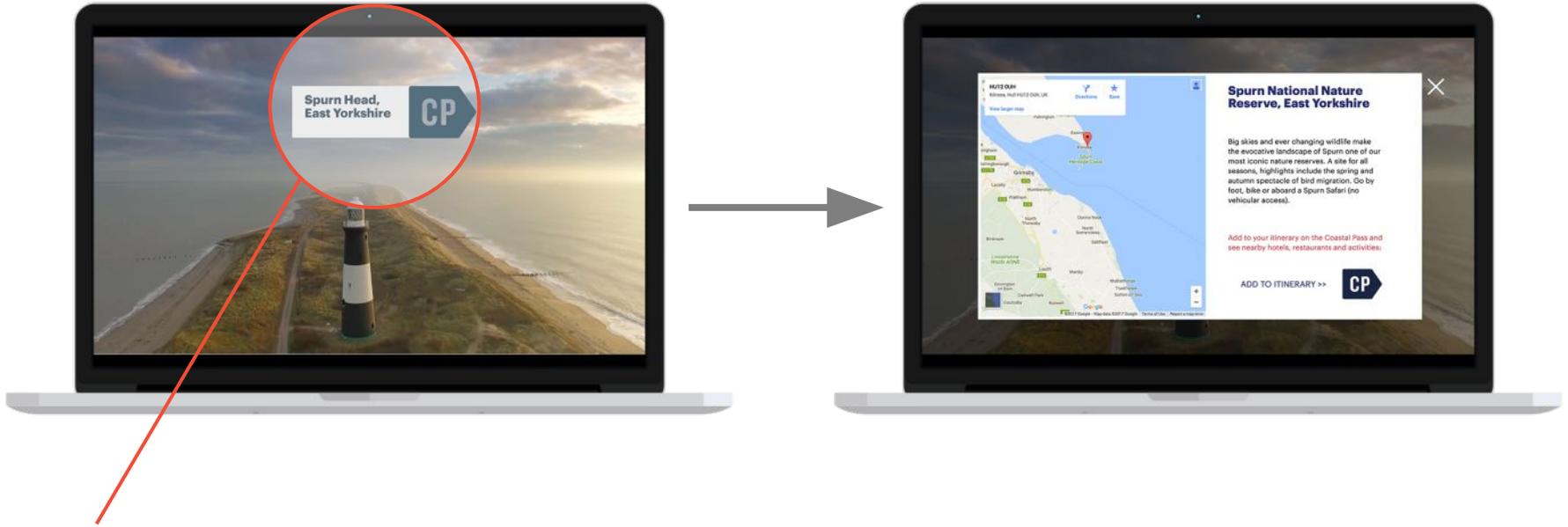


Arts and Culture



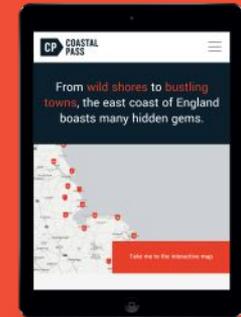
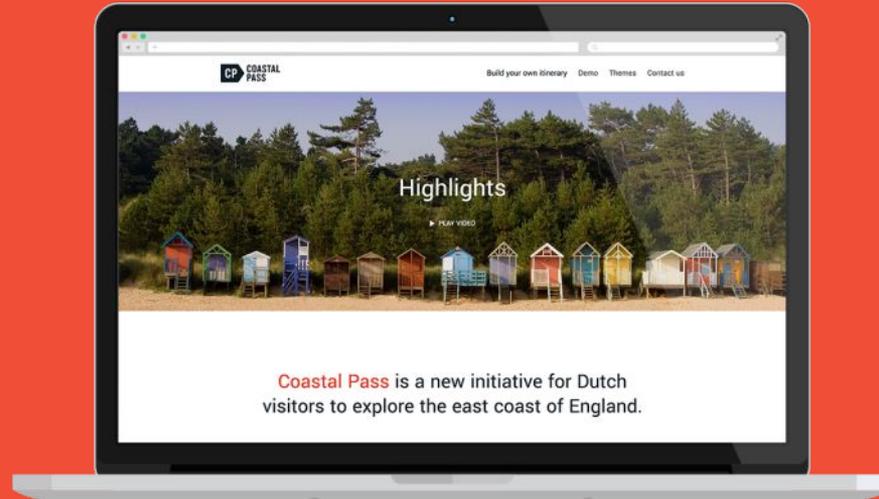
Coastal Life (*food and drink*)

What is Coastal Pass?

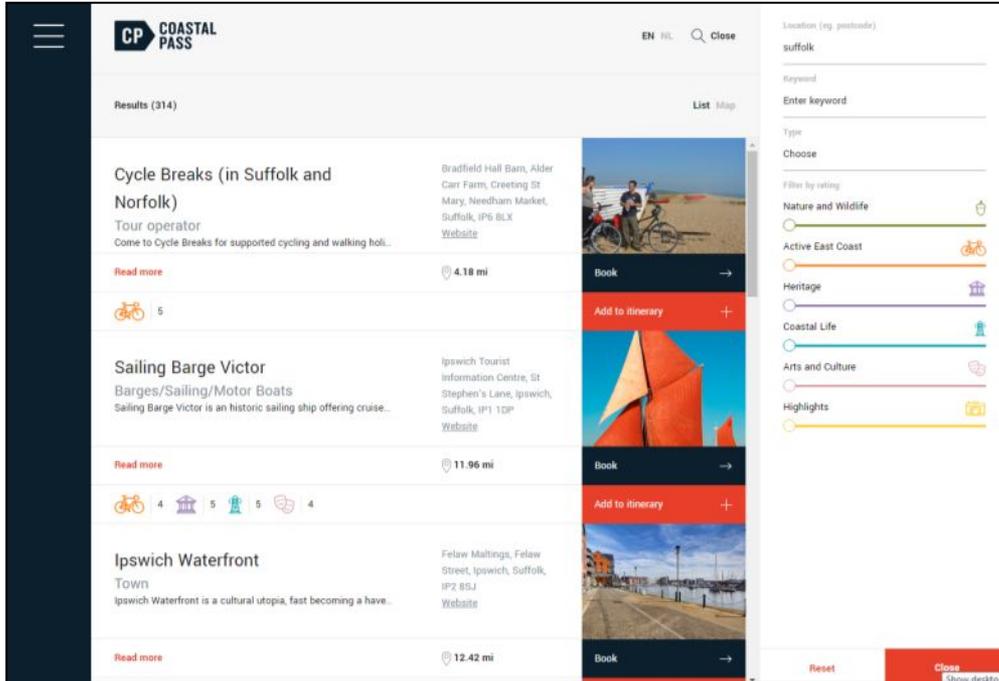


Interactive videos bring inspiration to life and start the process of creating personalised itineraries to explore and discover the East Coast of England

The Pass is fully responsive and enables users to access special offers



Search and create personalised itineraries

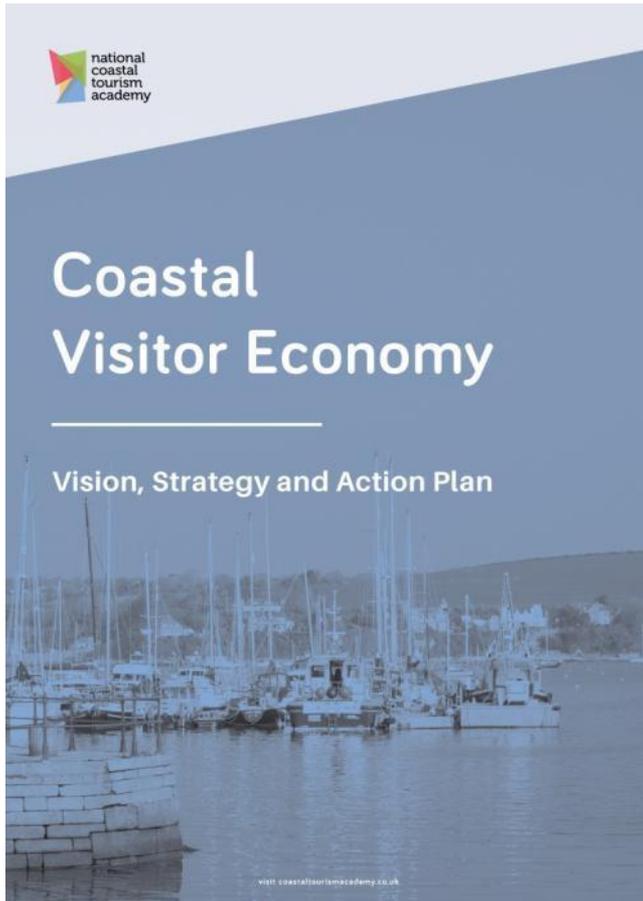


Users can use the application to create their own personalised itineraries – search by theme, location or type of product

When click or “read more” the **Coastal Pass** also shows details of nearby attractions and accommodation



What next for the coast?



Vision for Coastal Visitor Economy

Visitor economy is growing but has significant unrealised potential.

Key part of coastal economy needs to be strong to support wider economic growth on the coast

Available to download via:

[www.coastaltourismacademy.co.uk/
resource-hub](http://www.coastaltourismacademy.co.uk/resource-hub)

Core Strengths of coastal offer

What makes the coast special?

The coast has a wealth of product and experiences that make it attractive to visitors – National Coastal Tourism Academy research across a range of markets reveals a consistent set of core values that visitors particularly cherish. These strengths should form the basis of the coast's brand values.



Vision

Vibrant coastal communities

Vibrant distinctive coastal communities working together to make the coast a desirable place to live, work and visit – providing people with meaningful experiences and opportunities to grow the coastal visitor economy.

The Goal

Vibrant coastal communities

Addressing seasonality to lengthen the tourism season to create a more sustainable and viable coastal economy, which can attract inward investment to support other industries better.

Creating year round communities for residents – great places to live, work, invest and visit that are collaborative and connected.

Re-establish a pride in the culture and heritage of the coast that matches the unsurpassed natural beauty of the landscape and marine environment.

Providing opportunities to enable emerging talent to thrive in the coastal economy.



10

Four key objectives

and realistic actions for delivery in current climate

- Improving the Visitor Economy to support wider sustainable growth
- A quality experience, distinctive activities and places to visit
- Working together
- Presenting a positive image of the coast

Vision, Strategy and Action Plan

Objective 2:

A quality experience, distinctive activities and places to visit

Actions:

IMPROVING COMPETITIVENESS	QUALITY EXPERIENCES	SKILLS
On-going research and development on changing consumer needs and opportunities for growth on the coast and interpretation for action by businesses, as well as supporting businesses to ensure the product meets the needs of modern consumers	Curating and marketing experiences to the right audience	Demonstrate to businesses the commercial benefit of investment in their people to address lack of commitment in investment by employers because of the seasonal nature of employment on the coast
Adapting relevant research into online resources (e.g. product development guides, toolkits and online learning) actionable by coastal communities and SMEs	Greater and sustainable integration of culture, heritage, wildlife, coastal and marine environment in the tourism product offer	Raise aspirations of careers in tourism on the coast (perception of the industry) to overcome challenges associated with attracting the right calibre of candidate and address supply and demand for skilled employment in peak periods
Support businesses and destinations to undertake product market fit to match business / destinations to new opportunities for growth and support collaborative destination management	Support communities to use events to lengthen season and improve services to residents (Christmas, Half terms, New Year, Valentine's Day, Halloween)	Improving skills and education - focusing in particular on improving "soft skills", "management skills" and use of "digital media" - learning from work of NCTA to make training free and easily accessible [online where possible]
	Take advantage of the weather and encourage better engagement and appreciation of the coast across all seasons	
	Building local and regional audiences in winter months to sustain business activity and ensure residents and communities have a "year round" economy	
	Engaging businesses and destinations to deliver holistic visitor experiences (including pre-arrival and post-visit) by adopting a Visitor Experience Strategy as part of the wider Destination Management Plan	

13 visit coastaltourismacademy.co.uk

Priorities for action

Industry identified top areas of action

- Working together
- Raising awareness of the coastal offer and changing perceptions (especially off peak)
- Sharing best practice and research with actionable insight
- Support to develop the product

The New Economic Foundation estimate that the equivalent of an additional 64,000 jobs in England could be generated by 2025 if the visitor economy is supported to achieve national growth rates (3.8% per year)

Next steps

Supporting and delivering change



- Coastal Leadership Forum being established to take actions forward
- Discover England Fund application to further develop International market and provide skills, business support and visitor experience initiatives
- Working with existing networks

National focus for the coast

Engaging with Industry, Government and Destinations

- Raising awareness of the coast
 - Tourism Industry Council
 - Regular engagement with Government
 - Leading on vision for Coastal Visitor Economy
-
- DCMS Select Committee Inquiry in to Tourism 2015
 - All Party Parliamentary Group February 2017
 - Tourism Minister
 - Coastal Communities Minister



National Coastal Tourism Academy



Key messages:

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

Please get involved...

Job creation

Economic Growth

Best practice

Resource Hub

UNLOCKING TOURISM POTENTIAL



national
coastal
tourism
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