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Coastal Tourism Business Survey 2023 Summer Wave

Survey live between 21 June - 26 July 2023

NCTA Business Survey

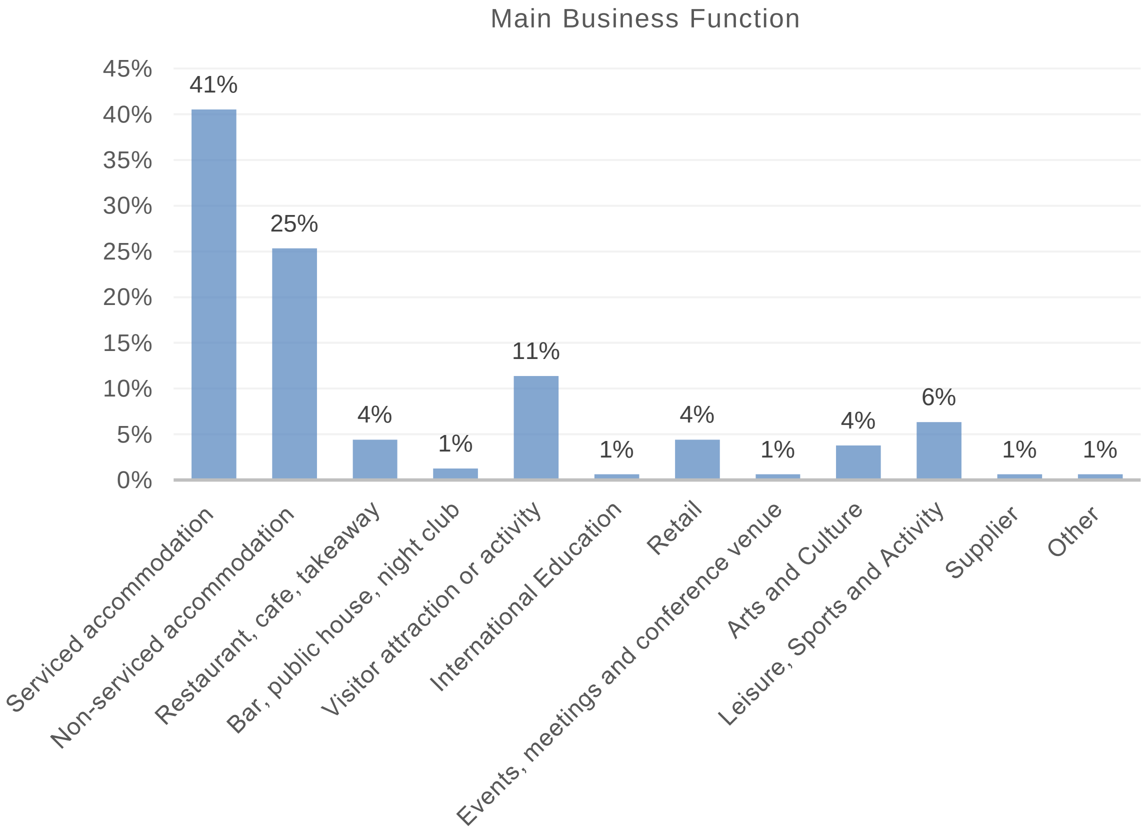
2023 Wave 2– Summer (survey was live between 21 June - 26 July 2023)

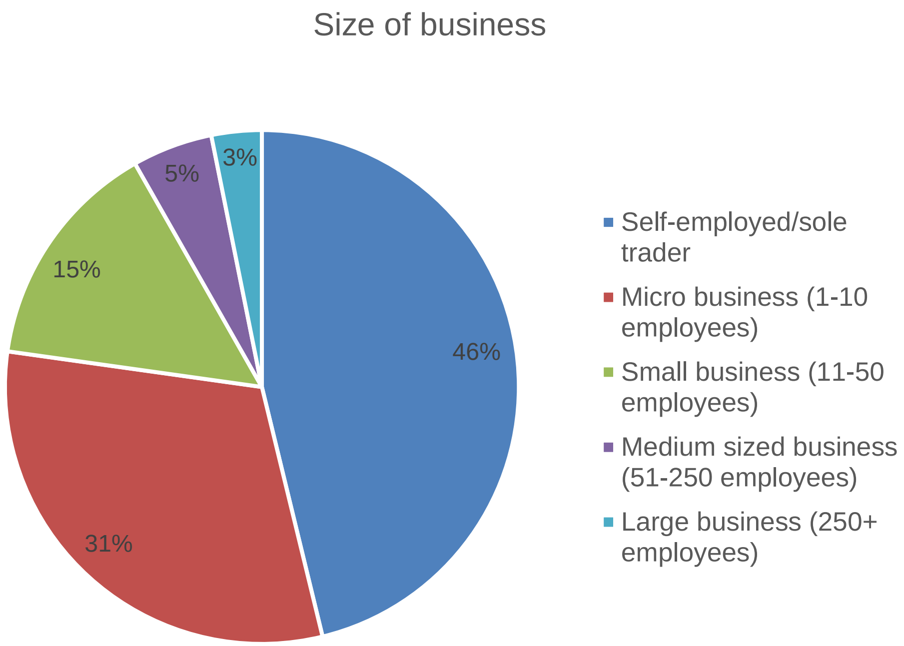
Key Headlines

- For nearly half (47%) of businesses, turnover was **worse** than in 2022. Only 24% said it was better.
- However, 46% were confident or very confident about the next 6 months.
- Larger businesses were the most positive and accommodation businesses the least positive in relation to turnover and business confidence.
- Long range bookings are low across all businesses.
- Businesses feel consumers are booking closer to departure and that overall spend is lower.
- Poor economic climate, increasing energy, fuel and supplier costs are the key external factors affecting business. 42% of accommodation businesses noted competition from overseas destinations.
- In response to the challenges, 64% are increasing their prices, 35% are delaying investment and 27% are reducing opening hours.
- In relation to staffing, the key recruitment challenge is filling specific roles particularly chefs and kitchen staff, waiting and bar staff, front of house and maintenance staff.
- Domestic overnight visitors remain the highest priority visitor market, but European and other International visitors are gradually increasing in priority.

NCTA Business Survey – 2023 wave 2

About respondents





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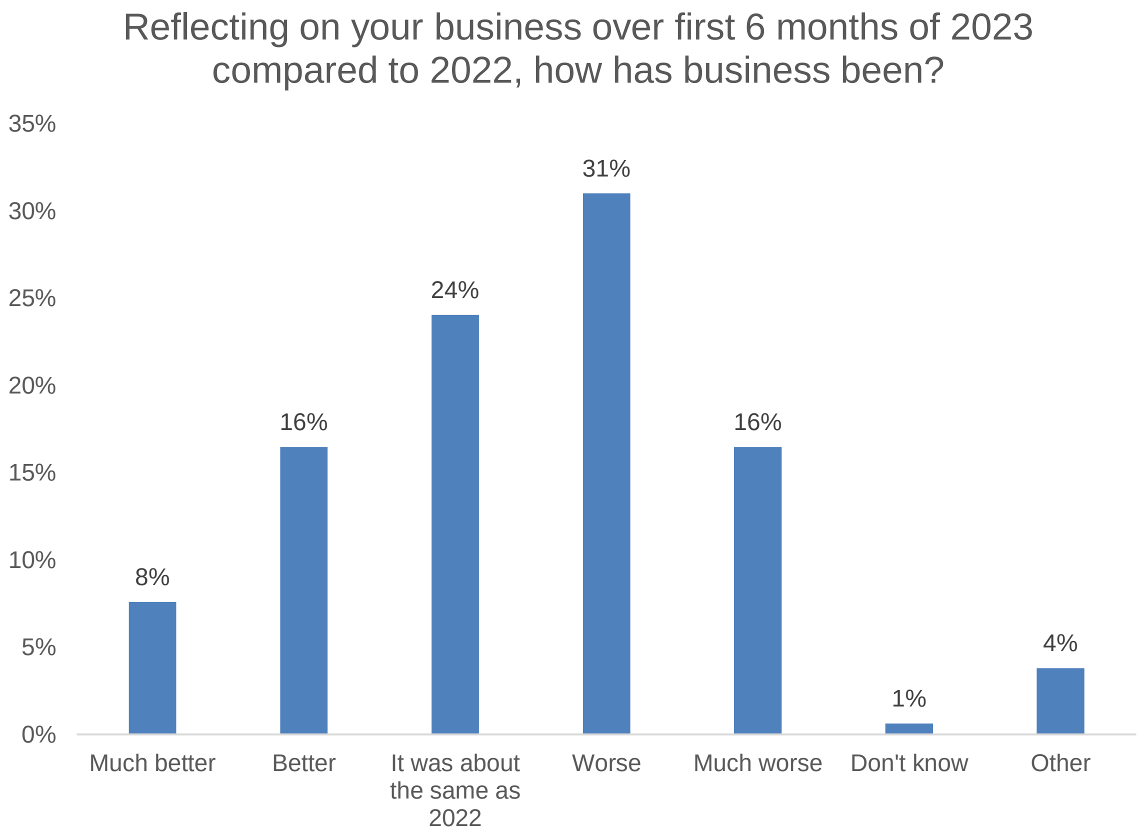
Turnover compared to 2022

47% reflected that business was worse than in 2022, only 24% said it was better

59% of accommodation businesses said business was worse compared to 2022.

However, for larger businesses, those employing 11 or more staff, 47% felt that business was better than in 2022 and only 36% said it was worse



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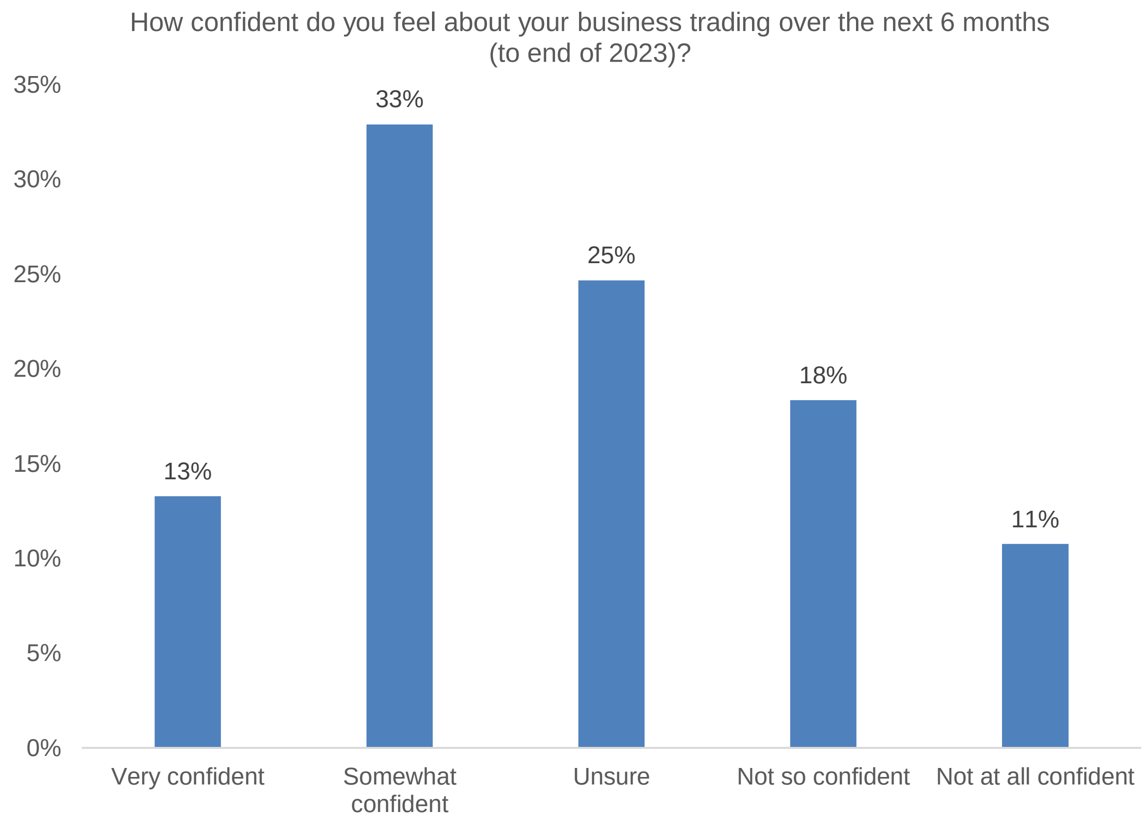
Business Confidence

Overall 46% of businesses are at least somewhat confident about the next 6 months of trading – almost the same as when the same question was asked in the spring.

As found in relation to business so far this year the most confident businesses were the larger ones – 69% were very or somewhat confident.

Similarly, accommodation businesses were the least confident with only 37.5% being very or somewhat confident about the next 6 months trading



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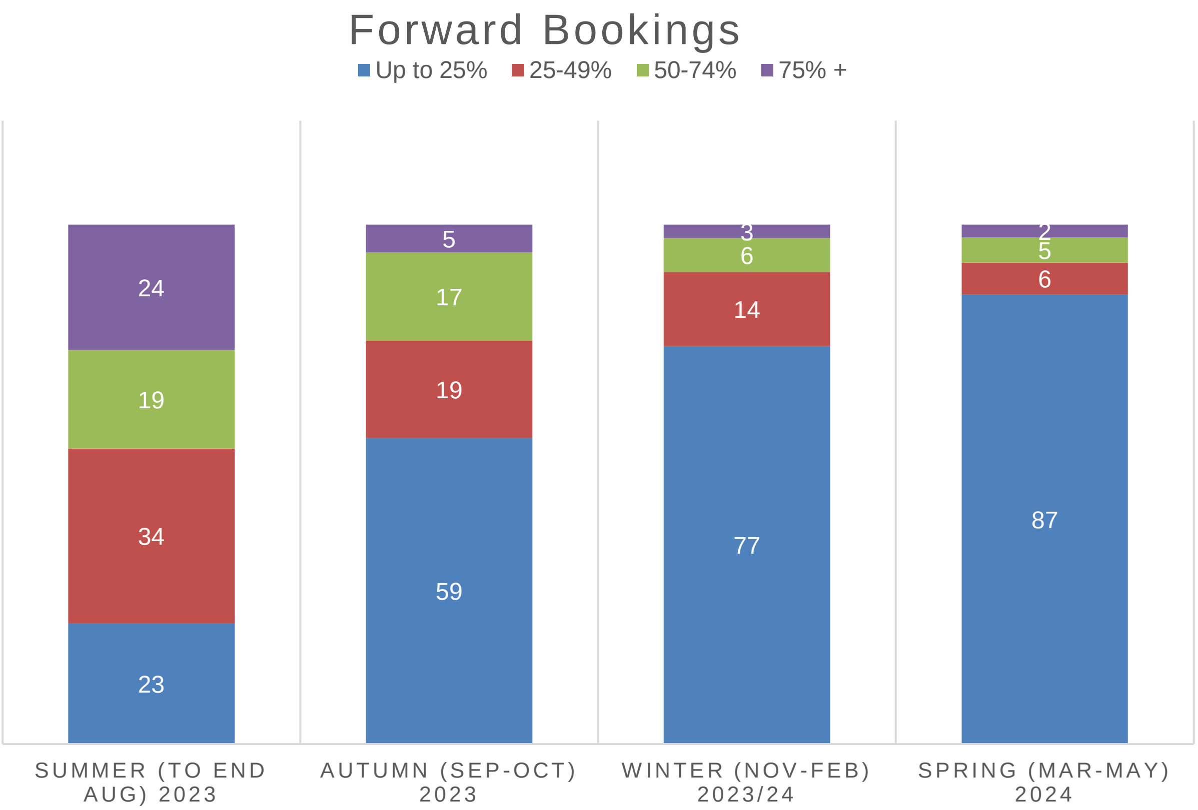
Forward bookings

Forward bookings are a mixed picture

Booking levels for the rest of the summer are good

From Autumn 23 onwards the majority of businesses are not more than 25% booked



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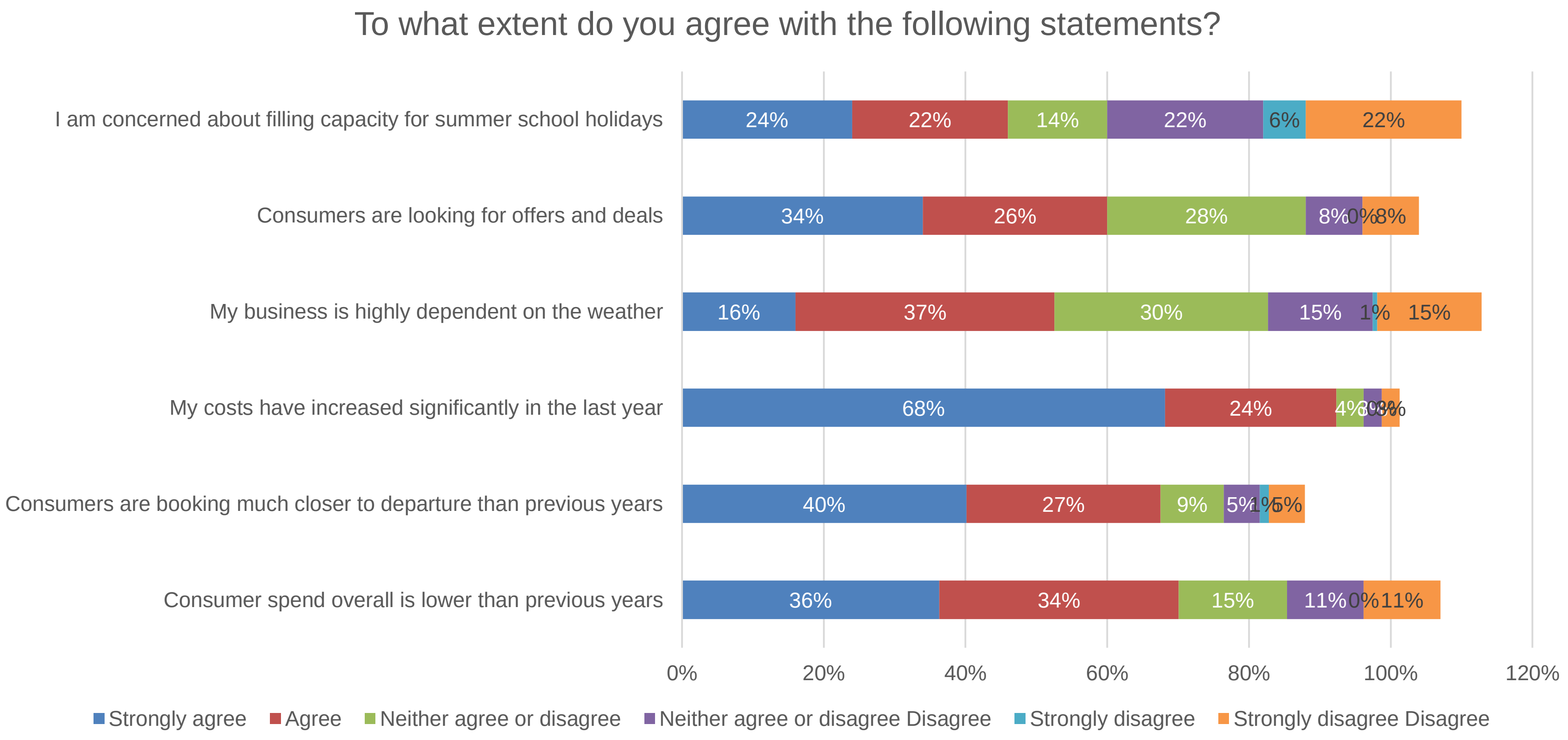
Thoughts on current state of the industry



As well as increasing costs there is strong agreement that consumers are booking much closer to departure than in previous years and that overall spend is lower

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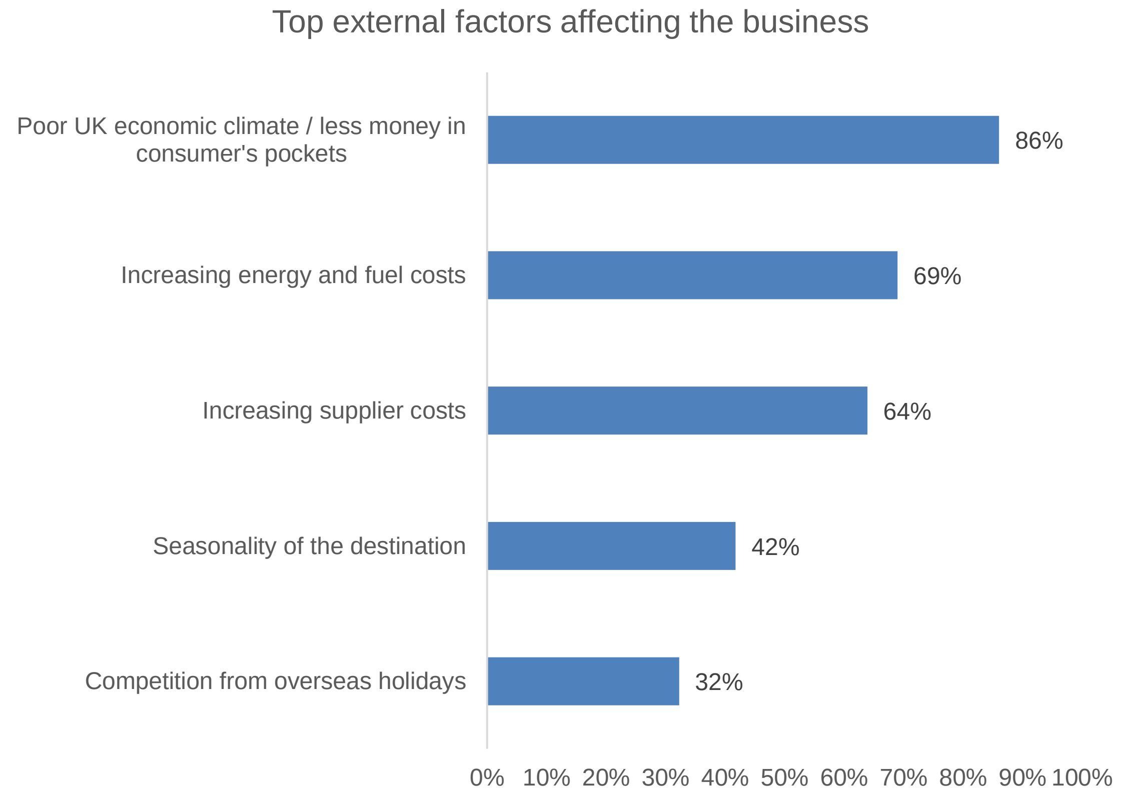
External factors affecting business

The top external factors influencing businesses on the coast remain consistent over the last few waves of the business survey. 42% of accommodation businesses feel they were particularly affected by competition from overseas holidays.

In response to the challenges facing businesses:

- 64% are increasing their prices
- 35% are delaying investment
- 27% are cutting costs by closing for more of the year or on certain days of the week
- 18% are reducing staff



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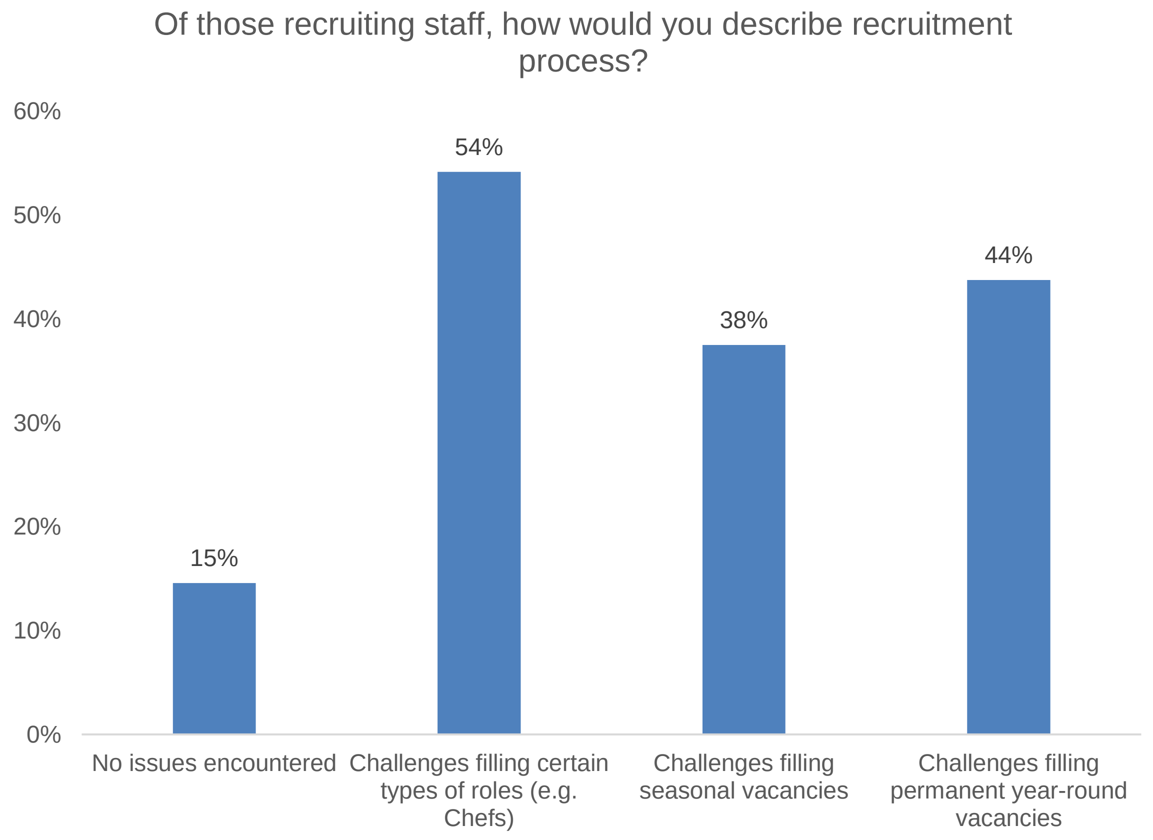
Staff recruitment

The key challenge for those recruiting staff is filling certain types of roles. For those businesses which noted this the key roles are:

Chefs and kitchen staff	43%
Waiting and bar staff	30%
Cleaning and maintenance staff	30%
Front of house (eg receptionist)	30%



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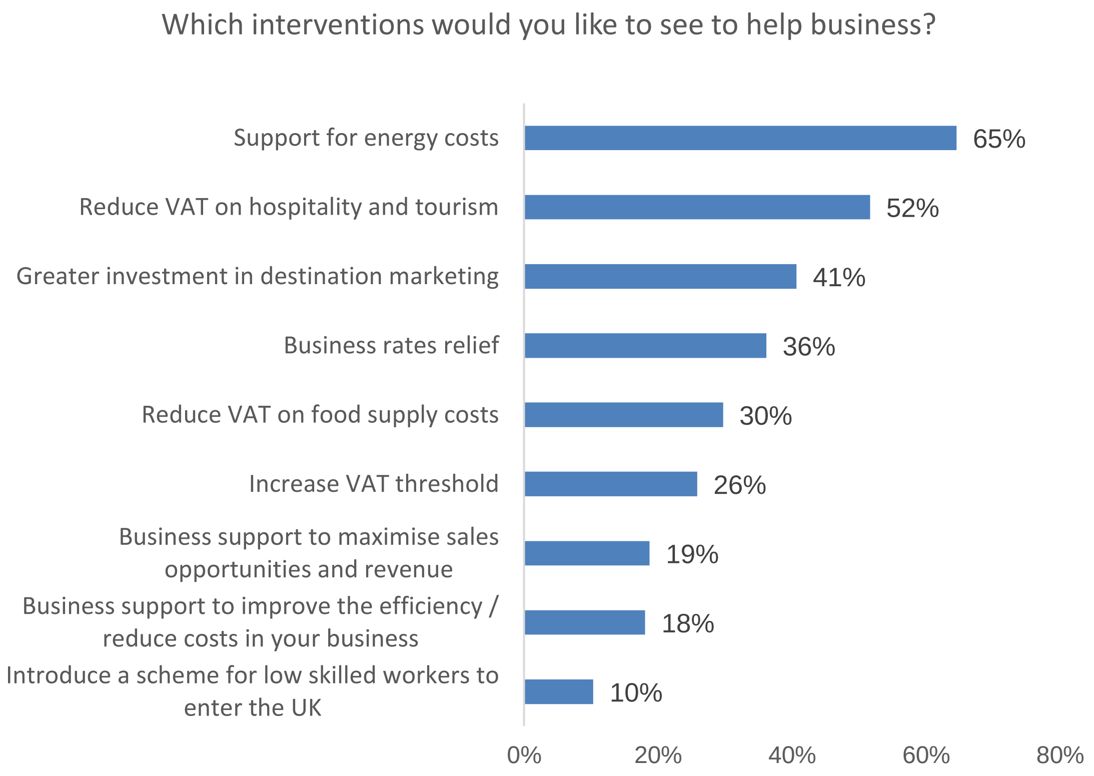
Business support

As in the last wave of this survey, nearly two-thirds of businesses would like further support with their increasing energy costs

There is still strong support for a reduction in VAT for hospitality and tourism

A significant 40% would like to see greater investment in destination marketing



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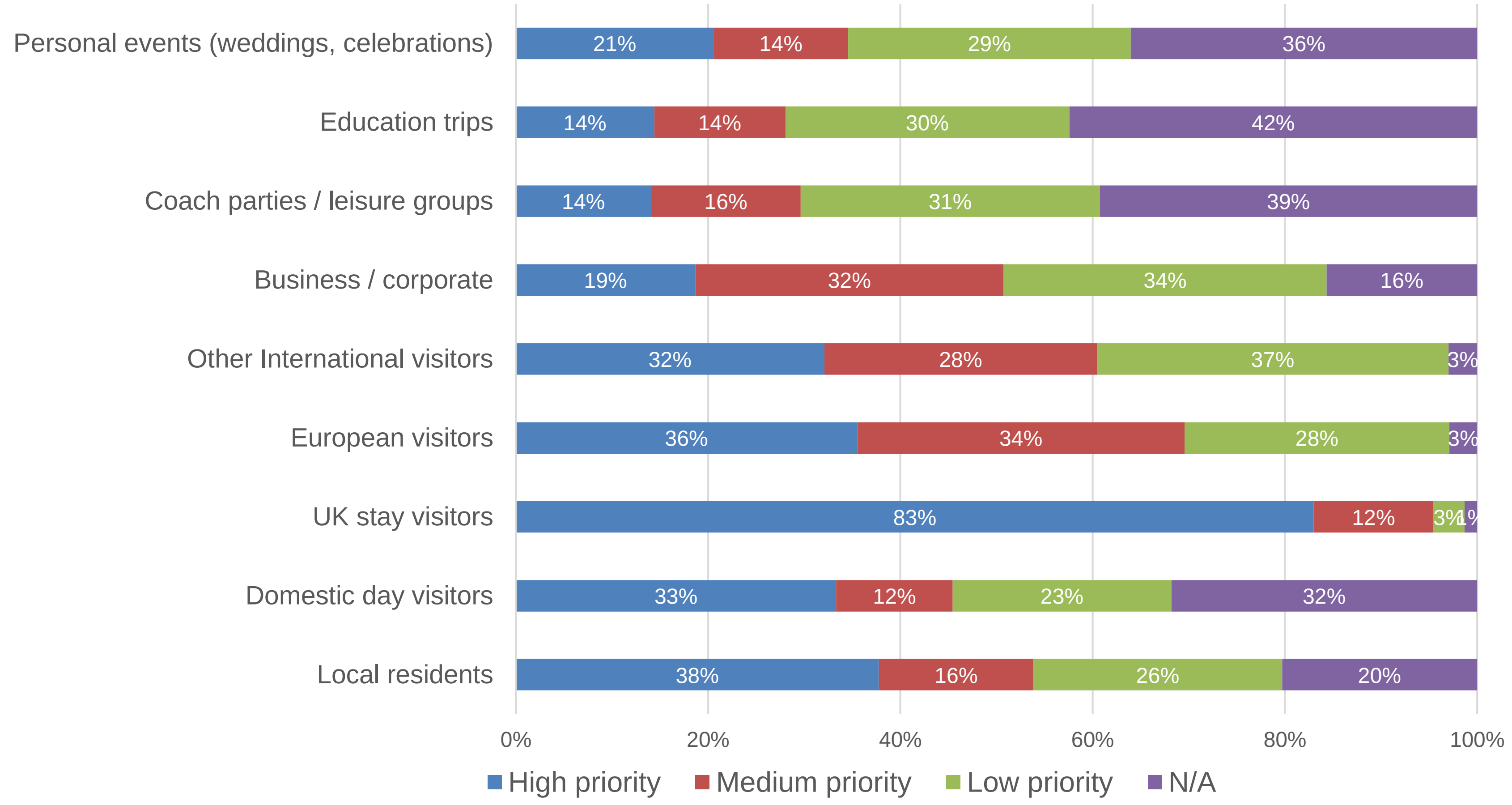
Key markets for 2023



UK overnight visitors are still the key priority with 83% treating them as high priority

There is a steady growth in priority for both European and other International visitors.

Local residents are important for 38% of businesses

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