

Coastal tourism

pre-COVID-19



Great Britain

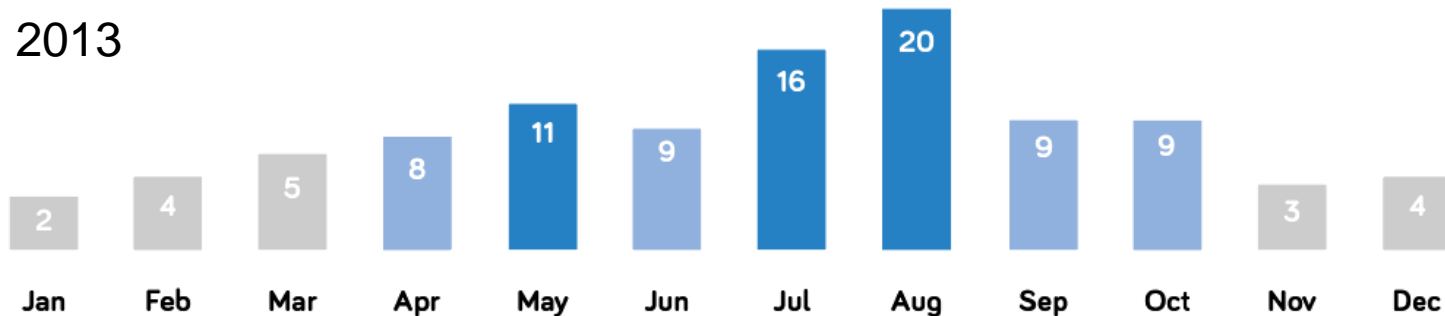
- **£17.1bn tourism spend**
 - 27m overnight visits, 217m day visits
 - 285k tourism related jobs supported
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England

- **£13.7bn tourism spend**
 - 21m overnight visits, 169m day visits
 - 210k tourism related jobs supported
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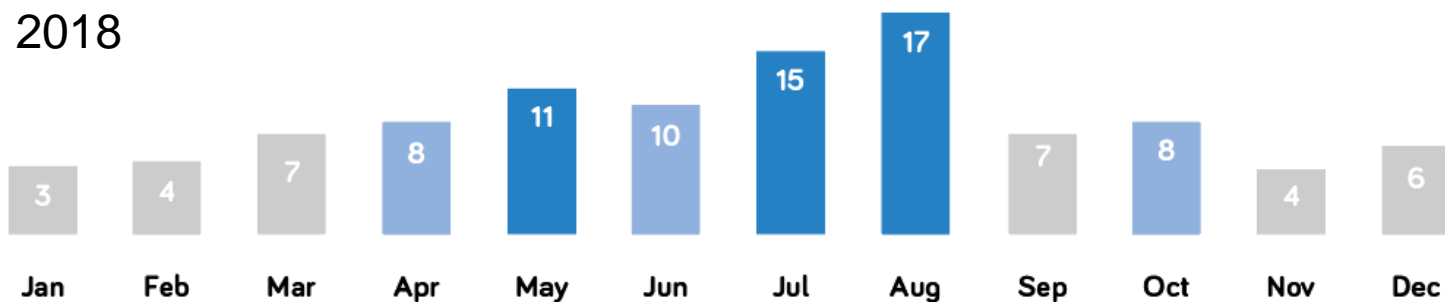
- 10% of all **international** visitors that arrive in UK go to coast
- Very high rate of **SMEs** (less than 3% corporate representation)

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

2020 forecast - Impact of COVID-19

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

2020 England – coastal impact of COVID-19

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

Verified with National Business Survey data on capacity and revenue

- £7.64bn loss in tourism spend
- 95m trips and day visits
- circa 131,000 jobs

2020 GB – coastal impact of COVID-19

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

Verified with National Business Survey data on capacity and revenue

- £9.7bn loss in tourism spend
- 121m trips and day visits
- circa 166,000 jobs



2021 forecast - Impact of COVID-19

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

2021 England – coastal impact of COVID-19

Based on closure Jan-Mar, partial April reopening, very limited international travel and reduced capacity due to social distancing

- £5.23bn loss in tourism spend
- 46m trips and day visits
- -38% on pre-Covid spend / 39% increase on 2020

2021 GB – coastal impact of COVID-19

Based on closure Jan-Mar, partial April reopening, very limited international travel and reduced capacity due to social distancing

- £6.6bn loss in tourism spend
- 60m trips and day visits
- -39% on pre-Covid spend / 40% increase on 2020



Impact of COVID-19

- 7% of businesses permanently closed
- Prior to latest lockdown, two thirds of businesses were operating at less than 75% capacity

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 (January / February 2021)



National Survey of coastal businesses (18 January – 7 February)

- **86.7% of businesses feel ongoing Government support will make “a significant difference between survival & collapse”** and the support they would like is grants (68%), Business Rate Relief (61%), Job Retention Scheme (42%), VAT extension (39%) and SEISS (29%)
- **86.7% of businesses saw a decrease in turnover in 2020** with 54.2% of all businesses seeing decrease of more than half their annual turnover and the average decrease in turnover -54%
- **53.71% say it will take more than a year before they return to a profit.**
- 39.90% of businesses have reduced their staffing levels, 3% have increased their staffing

59% planning to rethink their product or marketing proposition to aid recovery
– most considering new audiences (57%) or creating new experiences (45%)

Targeting new audiences, improving digital presence and increasing repeat visits were top areas of business support requested by businesses, in terms of specific digital support improving social media was the most popular request

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



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

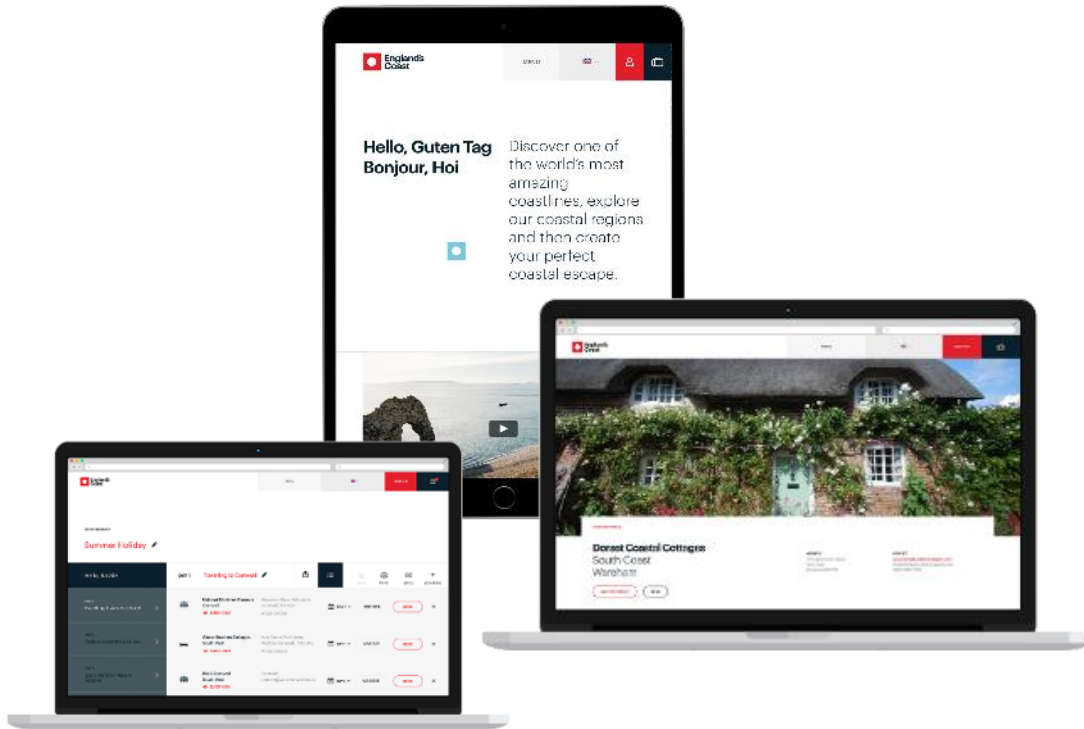
Economic Growth

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