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Coastal Tourism overview

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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
Bring together Government, Industry and Academia

Addressing seasonality

Economic Growth

Best practice

Leadership

Coastal tourism

pre-COVID-19



Great Britain

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

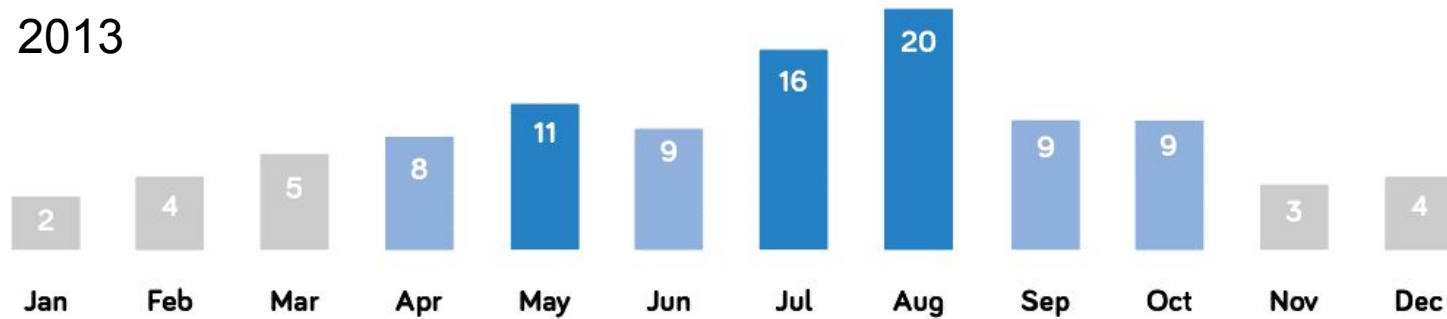
England

- **£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

2013



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)

2018



Coastal Tourism challenges

What are the key structural challenges that inhibit coastal tourism in the UK?

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

Transport and Connectivity

Brexit

What are the key opportunities for growth that coastal communities must seize post COVID-19?

Off peak growth markets

- International visitors
- Domestic visitors

Health & Wellness, Sustainability, Accessibility, Active experiences, Under 35s, Empty nesters (over 55s) and Business Events

Wider sector or coastal opportunities...

- England Coast Path
- Tourism Sector Deal

Impact of COVID-19

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

GB – coastal impact of COVID-19

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

- £10.35bn loss in tourism spend
- 155m trips and day visits
- circa 191,000 jobs

England – coastal impact of COVID-19

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

- £7.96bn loss in tourism spend
- 118m trips and day visits
- circa 145,000 jobs



Impact of COVID-19

- 7% of businesses permanently closed
- Majority of businesses operating at 40-60% capacity
- 20.7% planning to open longer into season, offset by 14.7% reduce season

Loss of –

- Events programme
- International Education
- Coach Groups
- Business Events and conferencing (Brighton, Bournemouth, Blackpool, Torquay)
- Cruise (Dover, Southampton, Portland, Poole)
- 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 – need national campaign

Media images of overcrowded beaches damaged confidence



Impact of Covid-19

43% of coastal tourism businesses say Government schemes to date have made a significant difference
78.4% of businesses feel ongoing Government support will make “a significant difference between survival & collapse”
Consumer confidence is fragile

67% state it will take up to a year before they can return to a profit and 31% believe it will take up to two years

Many Destination Management Organisations (DMOs), and organisations like the NCTA, that rely on commercial income, may fail

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

The good news...

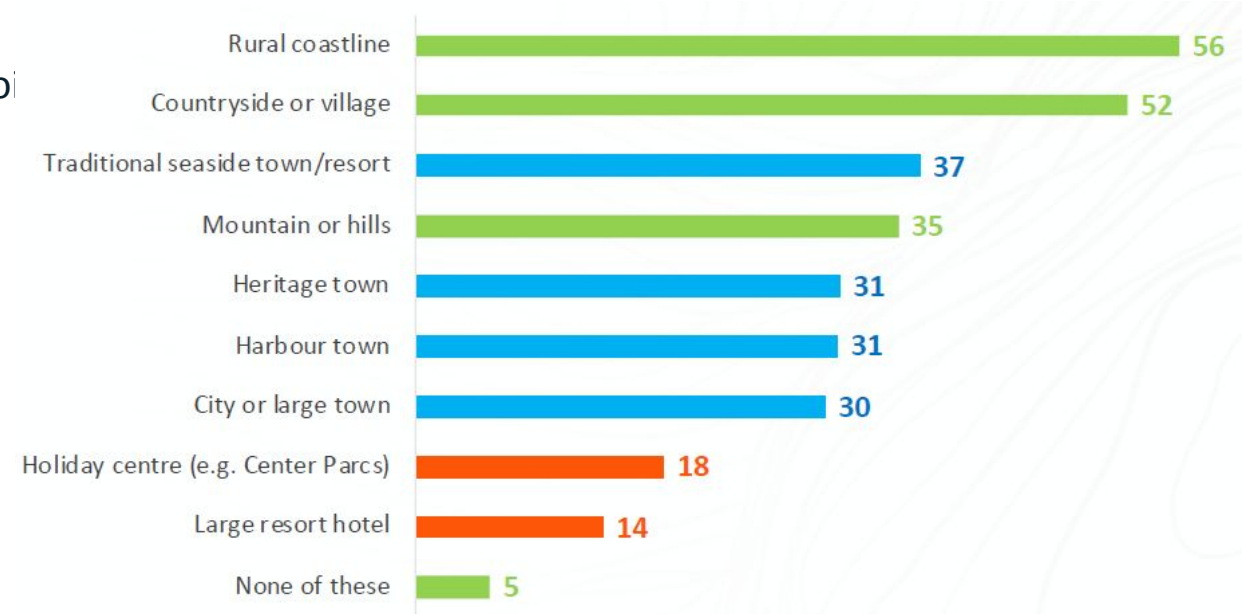
Consumer sentiment trackers consistently show coastal destinations are top choices to visit in next year

- Rural Coastline top choice, seaside town 3rd, Harbour town joint 5th choice

Pre-COVID coast is perceived as destination that is:

- Fun
- British experience
- Escape and relax
- Active
- Quality time

All values that score highly for post-COVID interests
BUT it will take time to recover to pre-Covid levels



Recovery and reimagine

What support can be afforded to coastal commerce and economies to optimise their capacity to drive much needed economic growth, employment and prosperity?

This is the opportunity to really tackle seasonality!

Build back better – green recovery, climate emergency

Completion of new England Coast Path National Trail opportunity

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

NCTA has developed programme with coastal tourism stakeholders that complements Tourism Sector Deal backed by 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 asking for £1.55m to cover 3.5 year programme

Call for action

Three year Coastal tourism recovery programme
Continuation of Coastal Communities Fund

Businesses – extension to VAT cut, support to survive winter, safe fair and legal playing field, change to VAT and business rates deadlines

Destinations – need review of structure and funding

This is our opportunity to support the coast to deliver change that builds resilience to economic and climate based shocks



The National Coastal Tourism Academy

All research and data available free from www.coastaltourismacademy.co.uk/resource-hub

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