

Coastal Tourism Workshop

Tuesday, 25th September 2018
Facilitated by Jason Freezer

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Setting the scene



Coastal tourism

A growing industry with untapped potential



- **£9.5bn domestic** overnight and day trip spend*
 - 13% of all **international** visitors go to coast*
 - **210,000 jobs** valued at £3.6bn (1% growth)
 - Very high rate of **SMEs** (less than 3% corporate representation)
-
- Pace of change is slow on coast
 - Slower rate of growth than national visitor economy
 - Perception and awareness issue

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Domestic tourism 2017 - England

Largest overnight holiday sector



	Domestic overnight (England all trips)		Domestic overnight (holiday trips)		All day visits		Tourism day visits	
Trips	22.72m	23%	16.71m	35%	170m	7%	116m	8%
Nights	86.69m	29%	68.80m	44%	n/a	n/a	n/a	n/a
Spend	£4,892m	26%	£4,003m	36%	£4,568m	6.5%	£3,393m	6.8%

Source: 2017 GBTS and GBDVS data

It is important to note this is Domestic visits to England.

Data relies on visitors identifying if they are visiting Seaside, Rural, City or Small Town

Notes:

1% drop in market share for "all trips"

Increase in actual volume and number of nights but drop in market share of 2% of "holiday trips"

Significant drop in seaside day visits with tourism day visits -6% volume and -10% spend

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Most visited English cities & towns

Trips by GB residents

Top 20 - Total trips (thousands)		
1	London	12519
2	Manchester	2567
3	Birmingham	2421
4	Scarborough	1609
5	Leeds	1559
6	Bristol	1499
7	Liverpool	1432
8	Blackpool	1251
9	York	1180
10	Newcastle Upon Tyne	1117
11	Brighton	1028
12	Sheffield	908
13	Bournemouth	869
14	New Forest	836
15	Southampton	800
16	Bath	792
17	Torbay	779
18	Nottingham	763
19	Skegness	704
20	Portsmouth	687

Top 20 - Holiday trips (thousands)		
1	London	4067
2	Scarborough	1318
3	Blackpool	1051
4	Manchester	905
5	Liverpool	653
6	York	644
7	Skegness	633
8	New Forest	592
9	Torbay	574
10	Newquay	521
10=	Birmingham	521
12	Brighton	477
13	Bournemouth	469
14	Great Yarmouth	430
15	Bath	424
16	Weymouth	402
17	Harrogate	400
18	Leeds	385
19	Chester	368
20	Windermere	366

Coastal towns and cities represent some of our key tourism product, especially for holiday trips

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Reducing seasonality

Little change since 2008



Off peak growth markets

- International visitors
- Domestic visitors

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

Why does seasonality matter?

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

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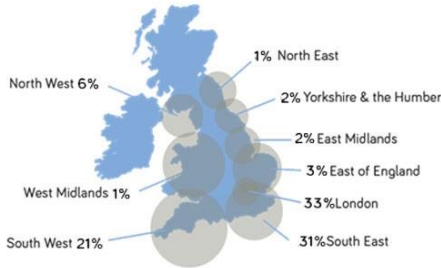
International Visitors

Region of visit and key source markets



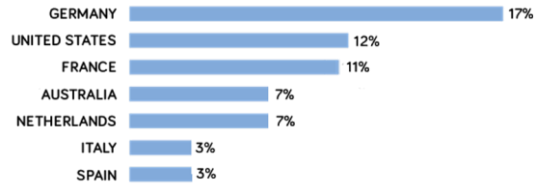
13% visit the English coast at some point during their stay in UK
 88% are on break of 4+nights (non coastal visitors = 55% on 4+ night break)

Breakdown of total England coastal visitors by region (%)



Source: IPS 2016 Total coastal visits divided by total overall visits to England coast

PROPORTION OF ALL VISITORS TO THE COAST, RANKED BY MARKET 2016



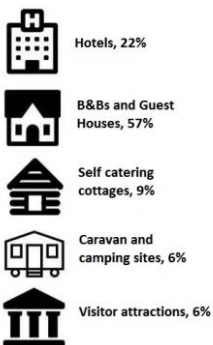
SOURCE: IPS 2016

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Coastal Business Monitor

Snapshot of performance on the coast



26% report performance was better

56% report performance was the same

18% report performance was worse

- 2017 results
- 400 tourism businesses

- 82% business performance was the same or better than last year
- Slight drop in confidence
- + More visitors in the area
- + Staycations due to weaker pound
- - Weather
- - Fewer visitors in the area

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Coastal Business Monitor



2018 has been a mixed picture

- Full report pending
- Even split between businesses that have managed to recover from poor spring and those that are still behind their expected performance level
- Hard to identify reasons for variance in performance between like for like businesses
- Signs of drop in spending, greater awareness of price during visit

Plans for the future:

- | | |
|---------------------------------|-----|
| • Establishing a new business | 7% |
| • Growing existing business | 28% |
| • Sell / retire in next 5 years | 28% |
| • Content with level of growth | 32% |
| • Unsure | 5% |

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Changes in the wider industry



Which will impact on coastal tourism

Industrial Strategy:

- Tourism Sector Deal
- Coastal references

Unknown impact and nature of Brexit

Business ownership and investment

- 28% planning to sell / retire

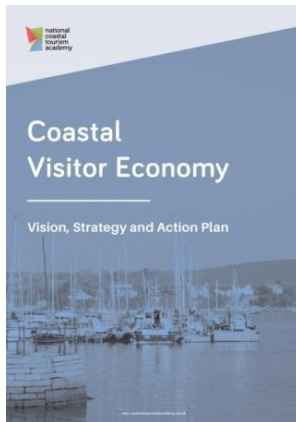
England's Coast Path

House of Lords Select Committee Inquiry into Coastal Regeneration



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Vision for Coastal Visitor Economy

Visitor economy has significant unrealised potential and not keeping pace with national growth.

Tourism is a key part of coastal economy, it needs to be strong to support wider economic growth

Available to download via:

www.coastaltourismacademy.co.uk/resource-hub

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Vision for coastal visitor economy

Developing vibrant distinctive communities

- Raising awareness of the coast
- Presenting positive image
- Stretching the season
- Collaborative working and sharing best practice
- Addressing staffing issues
- Product development

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)



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Investment on the coast

Coastal Communities Fund

Round 5 in application process



Since 2012, the Coastal Communities Fund has invested £174 million into 295 projects UK-wide

Over £100m of which invested in **113 projects** in England with tourism elements since the fund began

Initially a revenue fund, more recently has seen more capital projects, though inclusion of early “revenue only” application process for round 5 welcomed across the coast

Fund is significantly oversubscribed in England in recent rounds

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Other coastal initiatives



Coastal Revival Fund

- New £1 million round for 2018 to 2019.
- Targeted at bringing at-risk coastal heritage sites back into economic use.
- Bids of up to £50,000 per project.
- The first Coastal Revival Fund round provided £3.7 million to support 92 projects in coastal areas.

Coastal Communities Teams

Started in 2015 - £1.46 million has been provided to set up 146 teams around the British Coast.

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Discover England Fund



£40 million over 3 years

- To grow tourism in the regions of England
- To increase the competitiveness of England's tourism offer, domestically and internationally
- To develop bookable tourism products in line with market trends and in response to consumer demands

12 large scale projects (£500k+)

Many more small scale projects (up to £250k)



Get inspired:
englandscoast.com

Other tourism related initiatives



Cultural Development Fund

- New £20 million fund for culture, heritage and creative industries
- Areas bid for up to £7 million for a number of projects to help regeneration, create jobs and maximise the impact of investment.
- This could be for new spaces for creative businesses, bringing historic buildings back into use or redeveloping museums and art galleries.

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Other investment



EU Funds

- Channel Programme – SUFUSE project

Private Investment

- Premier Inn has announced a pipeline of more than 1,000 new bedrooms at seaside locations
- Travelodge has announced it is looking for 10 new hotel sites in cruise ports.
- Harbour Hotels Group – 12 properties and additional 2 to be re-branded in 2019, plus new Torquay Harbour Hotel

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Industrial Strategy

DCMS update



Activity 1

What are the priorities going forward?

How do we achieve this?

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Top priorities for investment and change



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Product Development & Marketing the Coast





Discover England Fund - Coastal Projects

Anke Monestel

25th September 2018



Discover England Fund (DEF) Overview

- **£40m committed over 3 years**
- **Aim:** Create world-class bookable product and share best practice with other destinations.
- **Why?** Ensures that England stays competitive in the global tourism industry, offering world-class English tourism products to the right customers at the right time.



Passport to the Coast

**Led by National Coastal Tourism Academy
Year 1 Project**

Using the Netherlands as a test market, the National Coastal Tourism Academy engages with tourism businesses along the East of England's coastline between Hull and Harwich. New video based technology will provide a fresh perspective for visitors.



**South West Coast Path - Amazing
Experiences and Making Memories**

**Led by South West Coast Path Association
Year 1 Project**

A whole range of bookable experiences brought together using new technology along the South West Coast Path, including scenery, activities, places to eat and accommodation, for German and Dutch visitors who want to explore on foot.



Culture Coasting

Led by Visit Kent

Year 2 Pilot Project

National Lottery match-funded by the Arts Council England through the Cultural Destinations Programme. This project involved developing bookable art trails along the South East coast of England, celebrating established galleries as well as the unique art of the surrounding communities.



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US Connections

Led by Destination Plymouth

Year 2 Pilot Project

A series of new, immersive, bookable English-themed visitor experiences, encouraging visitors to explore England beyond London, specifically for the US market. The project will also showcase the best of England's culture and heritage through the development of guided touring experiences sold via US tour operators/travel agents.



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England's Coast

**Led by National Coastal Tourism Academy
Year 2/3 Project**

Promoting England's coastline using interactive video technology allowing holidaymakers to create their own coastal itineraries. Inspiring visitors with a selection of each region's finest coastal locations and activities, this technology allows them to see destinations and retailers available along each route.



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Discover England's Great Walking Trails

**Led by Marketing Peak District & Derbyshire
Year 2/3 Project**

Promoting the great walking trails of England to visitors from Germany, the Netherlands, France and the US this project involves creating 3-to-14 night itineraries designed to promote walking holidays in England.



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Make Great Memories in England's National Park

Led by Peak District National Park Authority
Year 2/3 Project

This two-year collaboration of the National Parks in England will create a joined up, branded collection of experiences. The coastal parks involved are The Norfolk Broads, South Downs, Exmoor and The Lake District.



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England's Seafood Coast

Years 1/2/3 Project

Led by English Riviera

This project builds on the momentum of Years 1 and 2 of England's Seafood Coast to target the German, Dutch and French market it aims to transform the profile of England as a world-class seafood destination.



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England's GREAT South West Peninsula

Led by Visit Cornwall

Year 3 Project

This project targets the US and Australian market, this project aims to deliver targeted experiences including accommodation for family and friendship groups from Australia and the USA.



Leisure excursions in Southern England for Cruise & Conference

Led by Southampton City Council

Year 3 Project

This project involves a suite of bookable, commissionable leisure excursions to encourage visitors to step ashore and explore the ports and surrounding counties.



Discover more than just a holiday

Led by Marketing Lancashire

Year 3 Project

This project targets 18-34 year old visitors from the Nordic region with culturally distinct experiences, inspiring them to explore the North West of England whilst acquiring new skills, discovering new tastes or undertaking self-improvement activities.



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For all Discover England Fund enquiries:

discoverenglandfund@visitengland.org

For more information:

<https://www.visitbritain.org/discover-england-fund>

Coastal Communities Fund

CCF – Product Development projects

Amble – Lobster Hatchery and Seafood restaurants

- Round 2 (2014) project
- £1.8 million to improve harbor and transform at Amble into a visitor destination promoting seafood.
- Project includes new restaurants, Harbour Village with retail space, and enhanced access along the shore.
- Result is transformation of the town and visitor experience – lobster hatchery, restaurants and retail experience



CCF – Product Development projects

Suffolk Coast – Food trails

- Round 3 (2015) project
- £490,000 to build a more robust tourism economy along the Suffolk coast.
- Part of the project was used to attract people in the off-season and developing Food Tourism
- Number of food tourism providers along the coast connected to create food trail, off-season food and drink festival



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CCF – Product Development projects

North York Moors

- Round 3 and Round 4 projects
- £455,000 Round 3 project showcased nature, fishing and culinary heritage as well as arts and traditional crafts of 5 communities along North York Moors coast.
- Series of year round events and festivals developed and marketed.
- £275,140 Round 4 project working with 140 businesses in the North York Moors Coastal Tourism Network repackaging walking, cycling and rail links to attract a broader range of visitors and develop off-season themed breaks.



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CCF – Product Development projects



Few other examples of projects funded

Round 4 projects in progress

- Blackpool Conference Centre
- Yorkshire Wildlife Trust – nature tourism
- North Devon – Ilfracombe Watersports hub

Round 5 projects – announced 2018

- Access Flyde Coast – improve visitor experience for those with disabilities
- Coastal West Sussex – active hub for water based sports



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Coastal Path



England Coast Path and Living Coast



1. **USP** – longest waymarked coastal footpath in the world

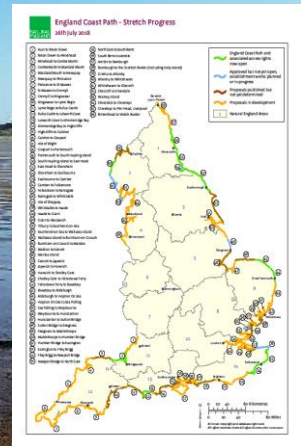
2. Tourism Benefits

- ✓ growing and new markets
- ✓ lengthening seasons
- ✓ strengthening local economies
- ✓ National Trail & DEF best practice

3. Economic Value

- ✓ 29 million leisure walking trips
- ✓ additional £335m/yr spent in communities within 10 miles of the ECP

gov.uk Report NECR253



Living Coast – a sustainable and equitable legacy from the new ECP



Our vision is that: more people from more sectors of society benefit from the environmental, economic and social services provided by the England Coast Path.

- ❑ National Partnership project to launch as the ECP is completed.
- ❑ National framework and funding strategy to facilitate local projects.
- ❑ Development phase with 3 pilot projects – Cumbria, Solent and Tyne to Tees.
- ❑ Working with coastal business, industry, landowners and communities, to unlock and help grow benefits for people and nature.
- ❑ Tourism. Rich environmental setting. More visitors, better access, more opportunities for high quality experiences in diverse coastal landscapes including more engagement with nature. More resilient local communities.

Project Manager: sarah.manning@naturalengland.org.uk



Activity 2

Is there need for collective voice for coastal tourism?

If so, who are the audience(s)?

What activity is needed?

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Priorities and next steps for the coast



Current Coastal Groups

National
Policy led

National
Industry led

Membership
representation

Membership
activity led

Several different types of organisations that influence, shape or help develop the Visitor Economy

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Voluntary Group – Policy Led

VisitEngland Coastal Destinations group



Invited coastal destinations meeting a few times a year

Specific activities:

- Conduit for updates from VisitEngland/VisitBritain activity
- Advisory to VB/VE on issues
- Representation (by Chair) in involved in VB/VE meetings (e.g. content)

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Voluntary group – Industry Led

Coastal Tourism Leadership Forum



Private / public stakeholders involved in coastal tourism (volunteers)

Specific activities –

- Meet three times per year to discuss actions to support coastal tourism vision
- Take tasks away from each meeting to action in own time, report back at following meeting
- Media sub-group keen to develop PR strategy

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Membership group – paid membership

British Destinations



Membership of Destination Organisations, Local Authorities

Specific activities –

- Lobbying and representation to government/ national agencies on key policy issues /coastal challenges
- Point of contact for connecting destinations (e.g. sharing best practice)
- Benchmarking

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Previous British Resorts & Destinations Association/British Resorts Association.

- National Trade Association for UK destination, subscription funded. Formed in 1921, restructured 1993 and renamed/adjusted since.
- Many Coastal Destinations in membership, including the majority of the bigger coastal resorts.
- Timely passage of strategic information, interpreted and key points highlighted where possible to reduce workload for those receiving it.
- Represent members interests national, to Government, to key agencies and bodies to other industry trade interests.
- Lobby for those interest, politically/administratively and influence views of other industry bodies and organisations to understand and support our position.
- Respond to key national consultations directly and/or with or through Tourism Alliance and other bodies. Encourage and influence responses from others.
- Run destination intelligence service/ provide benchmarking capabilities for, to and between members.
- Maintain library of national research/policy papers. Commission or facilitate production of key research including: previously 3 x SHU coastal tourism studies.
- Source and share best practice, ask a colleague service. Assist members wherever possible, a first point of call service.
- Heavily involved in coastal issues since 1990s, CLG Coastal Towns Inquiry, CCF VE Coastal strategy etc.
- Still heavily involved in coastal issues, Lords coastal towns inquiry, CCF, transport policy, HMO's, social service costs v resource allocations etc.
- Also working away on issues including: sustaining destination management Destination Bids, tourism levies, statutory registration, GIG and Sharing Economise, Industry Strategy, tourism zones, Brexit issues, business rates, the need for greater support for the c80% by volume and value domestic tourism, shape and nature of National Tourist Board support for the industry.
- Annual National conference, now shared with Tourism Alliance and Tourism Society, other issue based meeting and events as necessary, increasingly with other organisations. Ability for destinations to support ad hoc such events reducing due to pressure on destination management structures.
- Members are in membership for us to do the things they haven't the time or ability to do alone, to cover those shared issues and common causes that are best dealt with collectively, to avoid duplication of effort and for us to save them the time and resources that they no longer have to deploy speculatively themselves on national issues.
- Independent, able and willing to voice contrary opinion, to challenge and to ask the questions others would like to ask or hear answered.

Membership group –Activity Led

Historic Cities (*No Coastal Example*)



Membership – Destinations that meet certain criteria

Specific activities

- PR – domestic or international
- International/ Domestic Marketing
- International/ domestic trade activity – attendance an international trade shows, liaison with operators and support for product development
- Benchmarking / Research – shared cost of new product development research piece each year

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Activity 3

Achieving Success for the Coast
Which (if any) of these models could work for the coast?

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What would you support?

Taking the conversation forward we need to understand what you agree with and what you could support.

As you leave take five minutes to fill in the form on your thoughts for next steps

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Summary

Carolyn Custerson
Chair of Coastal Destinations Group

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Close and Next steps