national coastal tourism academy

The 'Big Picture' in Coastal Tourism 2016

Wednesday 5 October 2016

John Carmichael
Deputy Director

tweet @nctacademy
visit coastaltourismacademy.co.uk

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

Domestic Tourism Trends

Domestic Tourism Trends

Destination Type

City

Trips, per annum*:
+2.4%

Share of trips:
2006 > 2015:
27% 30%

Av. trip length:
2006 > 2015:
2.4 nights 2.4 nights

Small Town

Trips, per annum*:
+0.6%

Share of trips:
2006 > 2015:
18% 17%

Av. trip length:
2006 > 2015:
3.2 nights 3.2 nights

Countryside

Trips, per annum*:
+2.2%

Share of trips:
2006 > 2015:
21% 23%

Av. trip length:
2006 > 2015:
3.5 nights 3.4 nights

Seaside

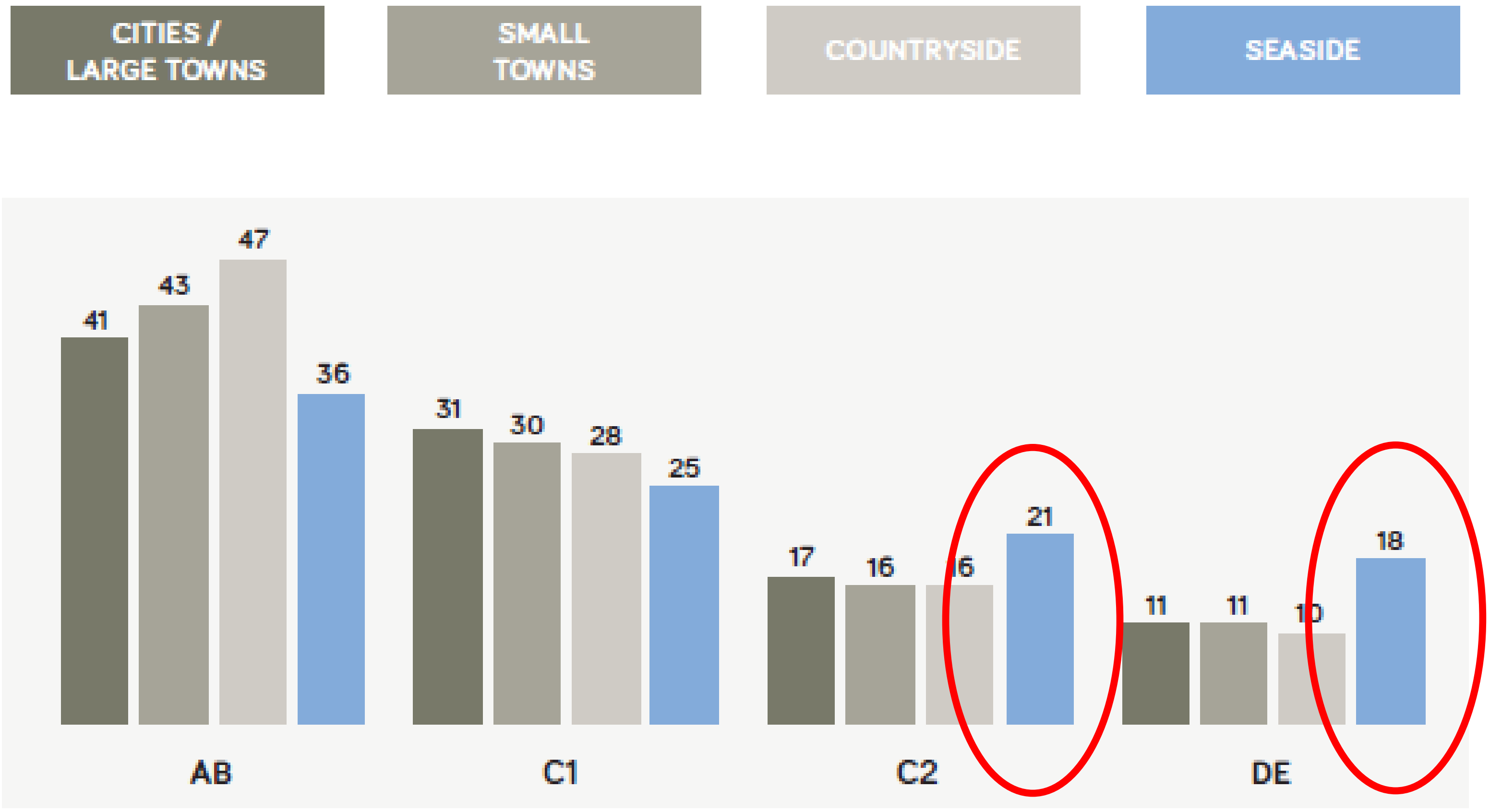
Trips, per annum*:
-0.1%

Share of trips:
2006 > 2015:
34% 31%

Av. trip length:
2006 > 2015:
4.5 nights 4.1 nights

Domestic Tourism Trends

Socio Economic Mix



Coastal tourism

national coastal tourism academy

£8 billion industry

	Domestic overnight (all trips)		Domestic overnight (holiday trips)		Tourism day visits	
Trips (m)	19.4	18.9%	13.7	30.6%	106	8.2%
Nights (m)	71.3	23.8%	55.3	37.8%	n/a	n/a
Spend (£m)	4,354	22.2%	3,443	32.1%	3,713	8.4%

Source: 2015 GBTS & GBDVS data

210,000 jobs

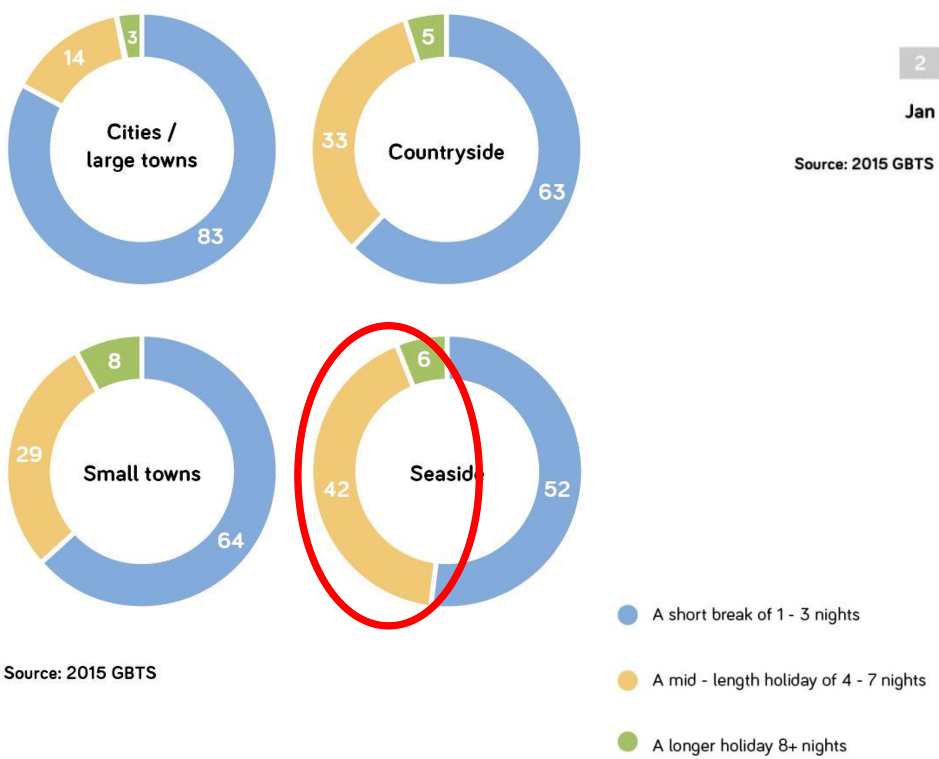
Very high rate of SMEs (less than 3% corporate representation)

national coastal tourism academy

Coastal tourism

Length of stay, seasonality and visitor profile

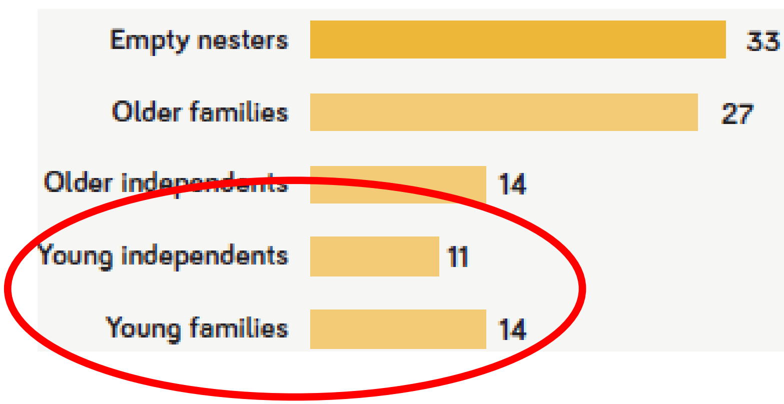
LENGTH OF STAY BY TYPE OF BREAK



Source: 2015 GBTS

TIME OF YEAR (% OF TOTAL)

Source: 2015 GBTS



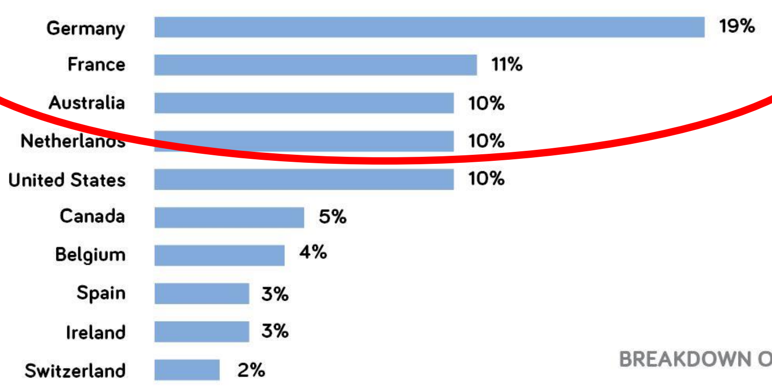
International Visitors

Area	England coast	All of England
Proportion of visits	15%	100%
Number of visitors	c.1.8 million	11.9 million
Gender	51% male, 49% female	50% male, 50% female
Age	54% aged 45+	40% aged 45+
Average party size	2.24	2.09
Income	43% earn £50k+	45% earn £50k+
Holiday length	82% 4+ nights	60% 4+ nights
Average holiday spend	£817	£632
Seasonality	47% - July to Sept	31% - July – Sept
Accommodation	40% hotel 9% rented house 9% camping / mobile home	48% hotel 4% rented house 2% camping / mobile home

Source: Overseas Visitors Research, prepared by BDRC from IPS and VisitBritain data

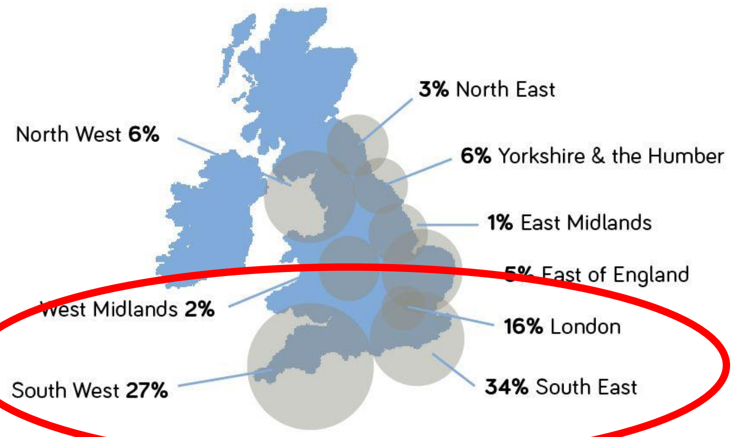
International Visitors

PROPORTION OF ALL VISITORS TO THE COAST, RANKED BY MARKET (2011*)



Source: IPS 2011: (*2011 proportions likely underestimate France given their rise in visits in recent years)

BREAKDOWN OF TOTAL ENGLAND COASTAL VISITORS BY REGION (%)



Source: IPS 2006-2011. Total coastal visits divided by total overall visits to England coast

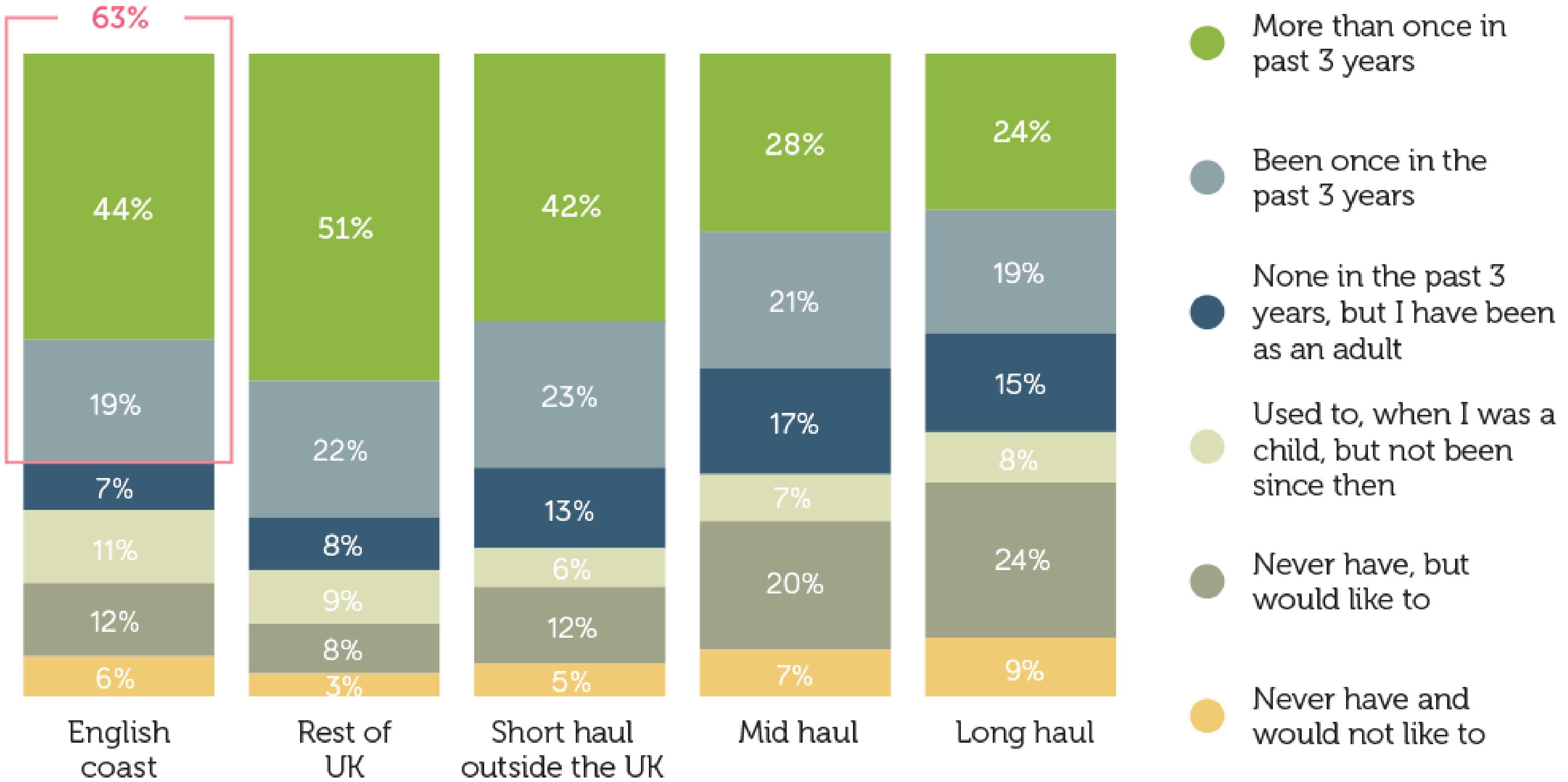
national coastal tourism academy

Opportunities for Growth

Under 35s
Empty Nesters

Under 35s

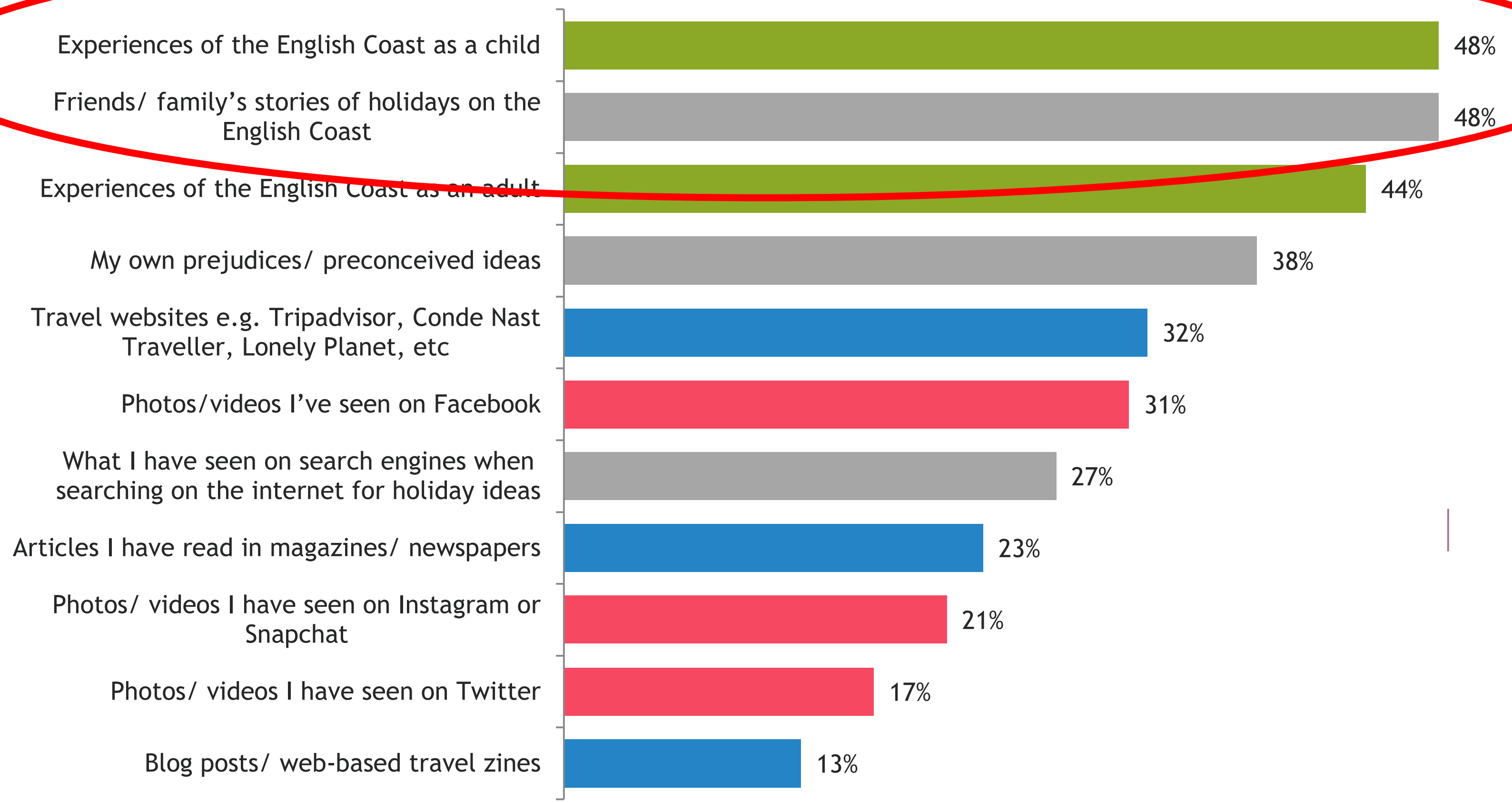
Visit Frequency



Note: Percentages may not add up to 100 due to rounding.

Under 35s

Influencers of Perceptions and Attitudes



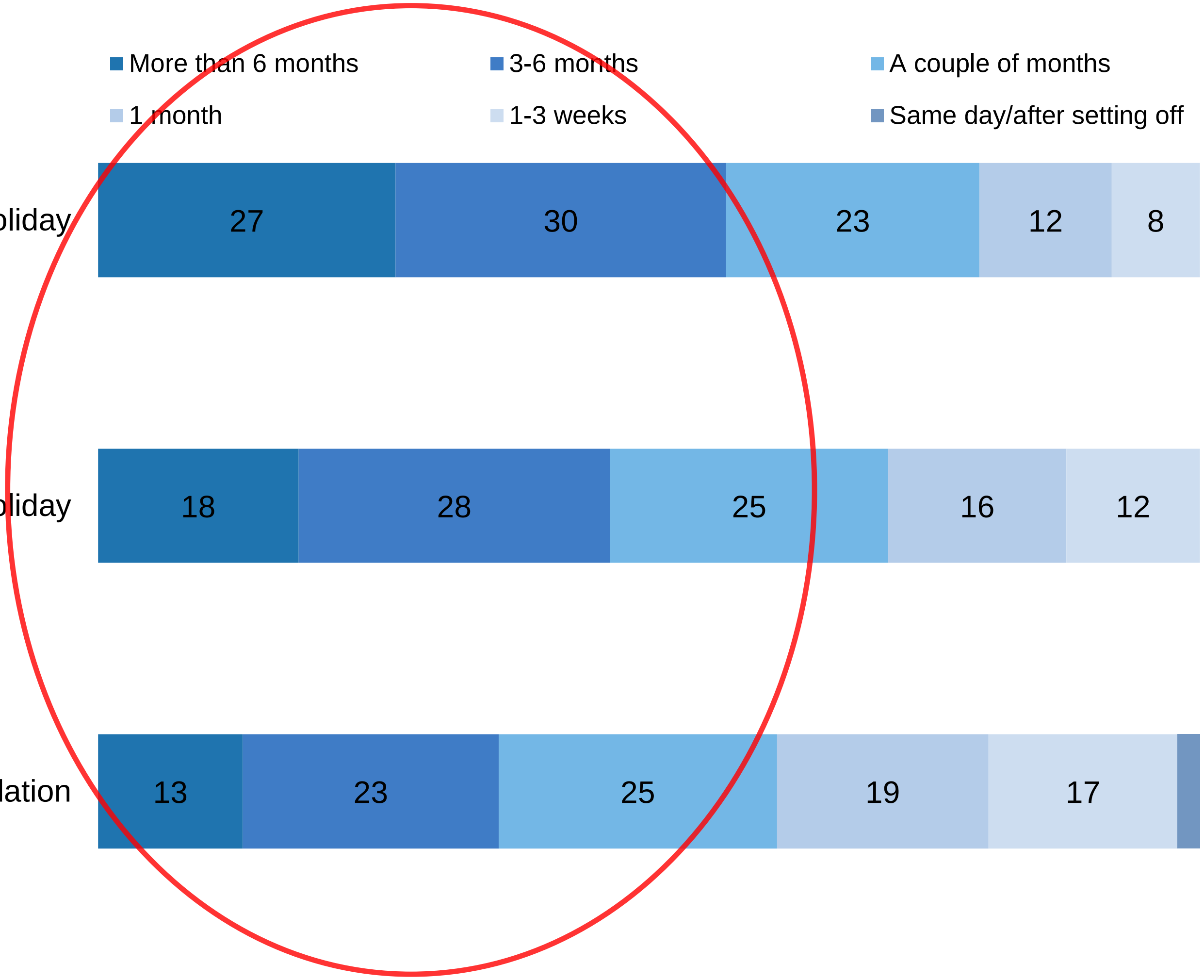
Empty Nesters

Key opportunity for shoulder season coastal tourism

- One third of UK population by 2024 (22.6 million people!)
- Pressurised but more financial freedom and options
- 50% open to visiting coast in off-peak periods

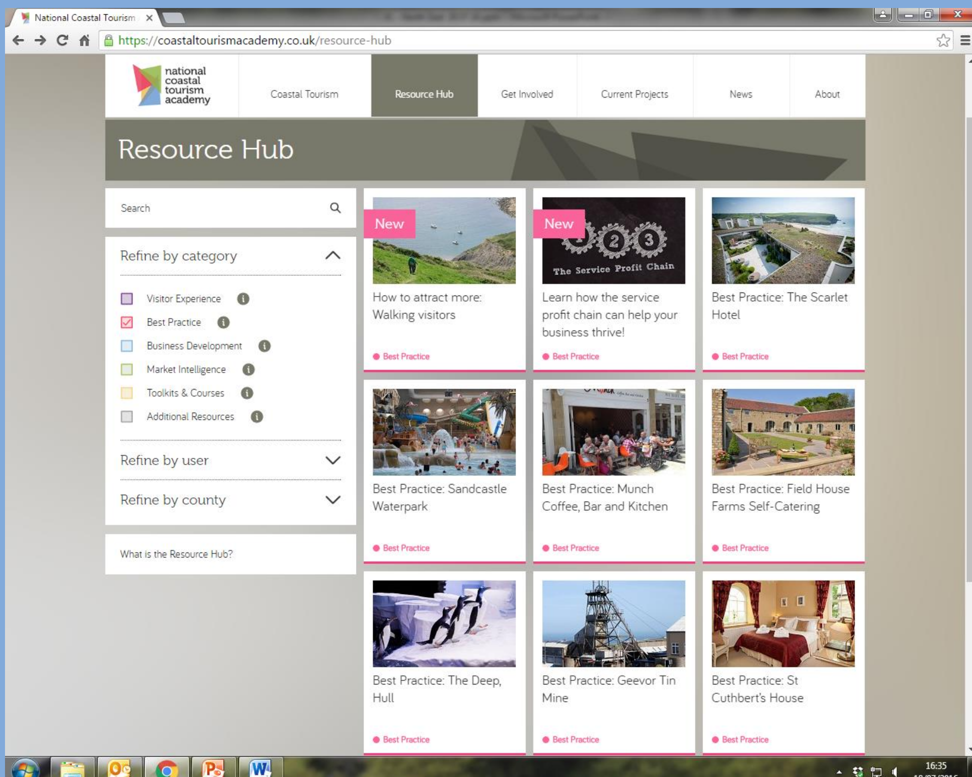
Empty Nesters

Planning & Booking



Resource hub

Online resource for industry



coastaltourismacademy.co.uk/resource-hub

Constantly updating:

- ‘How to Attract’ Guides
- Business Support Toolkits
- Best practice
- New ‘Market Intelligence’

For both destinations AND businesses

Do BIDs benefit the tourism industry?

Industry challenges

Destination Organisations

100% Funding at local level (eg. to sustain current activity)

Funding to support additional projects and priorities

Investment in public spaces (beach management, parks, high streets)

Support from national tourism organisation (change in VisitEngland structure and role)

Competing with other destinations

50% Changes to national policy (eg. focus change to international from domestic markets)

Encouraging engagement with the private sector beyond marketing and events

Coordinating a large number of SMEs

Retaining and improving quality

Encouraging investment in-line with changing comsumer expectations

20% Staffing issues

Personal Observations…

… from a destination marketing professional

- BIDs secure (medium term) funding for destinations
- Ability to develop & deliver destination plans
- Provide clarity on activity – input from stakeholders
- Opens up ‘match funding’ opportunities

- Destination and BIDs brands should align / complement
- Destinations with a presence in the marketplace will prosper

national coastal tourism academy

Thank you