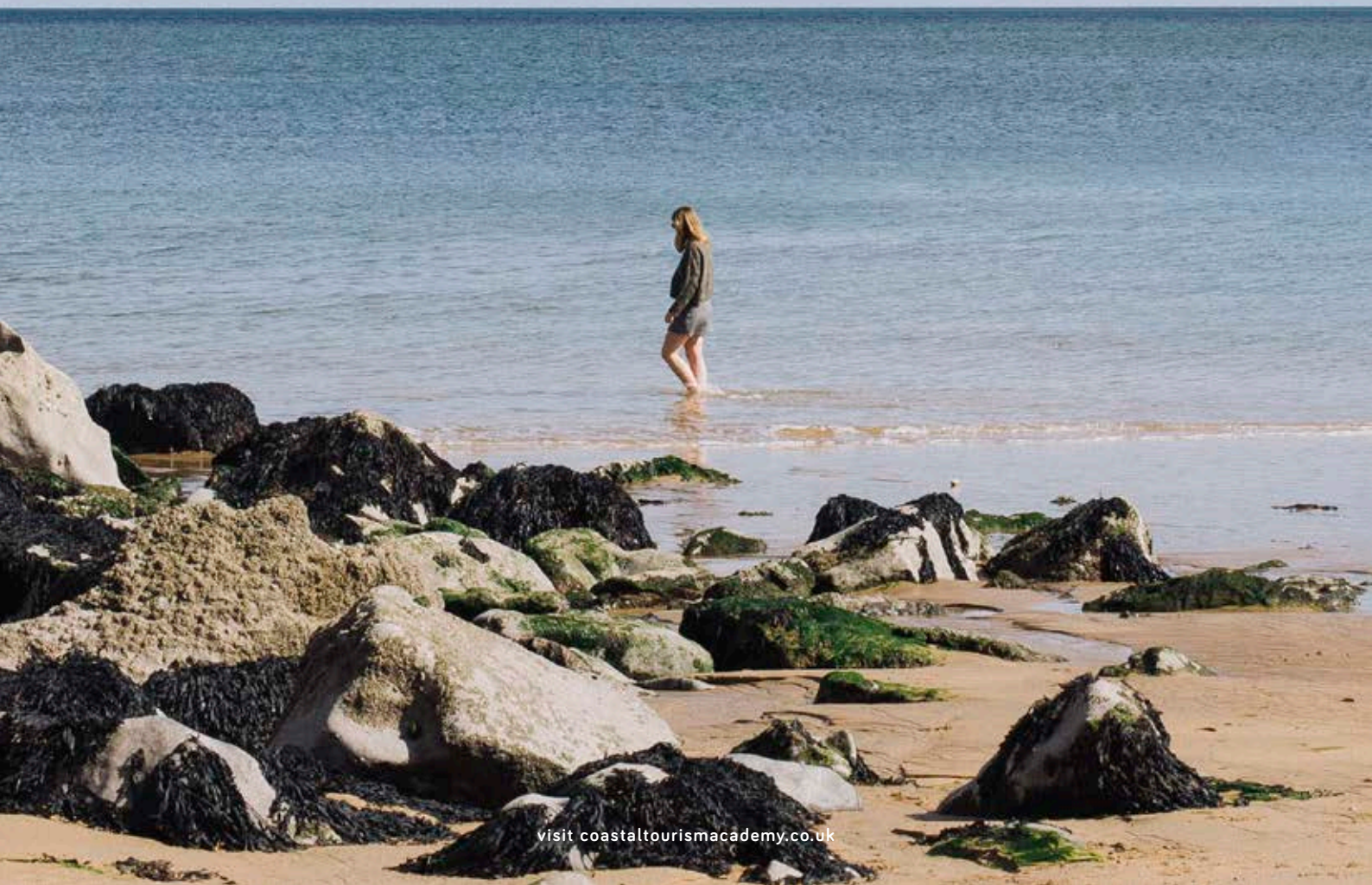
national coastal tourism academy

2016 Coastal Tourism

Summary report of challenges and opportunities for growth



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ABOUT US

The National Coastal Tourism Academy (NCTA) is a Coastal Communities Fund (CCF) project that analyses the nature of coastal tourism to help boost employment and the coastal tourism economy. It works with academia and the tourism industry to share learning, good practice and the creation and dissemination of research that leads to exceptional visitor experiences.

Publication date
May 2016

Version
1.2

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Coastal Tourism in 2016

Coastal tourism continues to be perceived as an industry in decline, yet a report by Sheffield Hallam University and the work of the National Coastal Tourism Academy (NCTA), challenge this perception.

This paper builds on the previous report published by the NCTA *Coastal Tourism 2015* and seeks to update the picture on the current status of coastal tourism in England, the context within which it operates and some of the key opportunities and challenges it faces. The paper reviews all the known data published on coastal tourism and key issues impacting growth on the coast, combined with primary research undertaken or commissioned by the National Coastal Tourism Academy.

A number of research gaps were identified at the end of the NCTA's report *Coastal Tourism 2015* which the NCTA has since begun to address; the findings from this work will be covered in this report.

This is a discussion document attempting to provide an holistic view of the issues facing the visitor economy on the coast and opportunities for accelerating growth in coastal tourism.

The research and data presented is interpreted by the National Coastal Tourism Academy.

EXECUTIVE SUMMARY

Key findings:

- Domestic and day trip coastal tourism is collectively valued at £8bn to the English economy, representing **31%** of domestic overnight holiday trips and **8%** of tourism day visits

- Seaside tourism has regained its position as the largest domestic overnight holiday sector, but it is a position under threat by city breaks and so the coast cannot be complacent

- The coast is finally seeing a shift towards more short-breaks following the wider trend, demonstrating that accommodation on the coast is now more flexible to meet consumer demand, and this trend is set to continue and grow. However, the delay in seeing this trend realised is evidence of the slow speed of change on the coast

- **15%** of international visitors visit the English coast, valued at c.£927m

- Growth in tourism employment nationally is not replicated to the same scale on the coast

- Coastal tourism businesses continue to face staffing challenges relating to recruitment, engagement and retention. Skills gaps are particularly noticeable for chefs, house-keeping and more generally for customer service and other soft skills

- Funding destination management is a key challenge on the coast and due to the high volume of small to medium sized enterprises (SMEs) involvement from the public sector is required to support collaboration and leadership. Priorities for development for destinations are improving the visitor experience and attracting new markets
- The most successful destinations are those that have had strong leadership, a clear strategy for destination management and collaborative partnerships across the public, private and tertiary sectors

- Government investment in the coast and tourism via the Coastal Communities Fund and Discover England Fund are greatly welcomed and should help support sustainable development on the coast

- There are strong and multiple opportunities for growth in the visitor economy on the coast. Increasing off-peak visitors and in particular focusing on empty nesters (over 55s), developing health and wellness product, reinventing the coast as a place for business events and raising awareness among under 35s and international visitors present just some of the opportunities. However, establishing the right product market fit for each destination is essential

- Sharing best practice and lessons learnt from implementing change, like the work delivered by the NCTA to improve the visitor experience and fostering innovation, will enable faster, more sustainable and cost effective change on the coast

- The coast is considered by many as a national treasure and yet visiting the coast is not a high priority, this is predominantly the result of a lack of awareness of the actual product available and stronger more coherent messaging from other types of experience. The coast needs to work collaboratively to alter perceptions and reinvigorate a strong desire to visit and explore the coast

This report concludes that coastal tourism is undervalued and has significant growth potential. The work of the NCTA since its inception in 2013 has provided coastal communities with access to advice, research and practical tools to deliver change. The change now needs to be enabled and coordinated with an on-going commitment to research and development and sharing of best practice to ensure that funding is used wisely and the coast's true potential is achieved.

Key recommendations:

To achieve its growth potential coastal communities need:

- Continued investment in research and development, best practice and advice on ways to achieve growth
- Business support and training for SMEs and independent tourism businesses to deliver change
- Support to create collaborative partnerships within and between destinations, undertake a detailed product-market fit exercise and develop a clear vision for each destination
- On-going commitment to investment in the coast to bring growth in line with national averages. This should be supported by a more coordinated approach to funding for coastal development
- Increased support to raise awareness and change the perceptions of non-visitors, the media and government to reduce the gap between the perceptions and reality of the coastal tourism offer and its importance to the UK economy

SETTING THE CONTEXT

Background

Coastal tourism is an important part of the visitor economy but historically has been a little understood or researched area. Since its inception in 2013 the NCTA has been seeking to bridge gaps in knowledge by commissioning research focused specifically on coastal tourism. At that time there was a general perception among the public, media and government that coastal tourism was an area of the tourism industry in decline.

The NCTA's *Coastal Tourism 2015*, began to challenge that view, building on the earlier report by Sheffield Hallam University on employment in coastal tourism.

Coastal tourism is an extremely disjointed industry, until recently there has been little coordination of activities on the coast and each coastal destination is unique in the way that it is set up and administered.

This report continues to build on the work published in 2015, and whilst it is clear that there are still further gaps in knowledge, the NCTA now has a wealth of information available to support the growth of the visitor economy on the coast.

Full details of all of the research mentioned in this publication can be accessed via the NCTA Resource Hub.

coastaltourismacademy.co.uk/resource-hub

METHODOLOGY

The methodology of NCTA-led research is outlined briefly here. All sources used in this report are shown in the footer notes:

- Consumer research (national) – this data was analysed on behalf of the NCTA by TNS using the *Great Britain Tourism Survey* (GBTS) and *Great Britain Day Visits Survey* (GBDVS) results and includes 2014 and 2015 data.

- Consumer research (international) – this data was analysed on behalf of the NCTA by BDRC using International Passenger Survey (IPS) data and a number of research reports published on the VisitBritain website, Research and Insights.

- Key issues affecting coastal tourism businesses - as part of a UKCES funded project, the NCTA commissioned research in autumn 2015. Representatives from 270 businesses in Brighton and Hove, Eastbourne and the Isle of Wight were interviewed representing a mix of hotels, guest houses and food and drink businesses.

- Opportunities for growth (key sectors) – Research commissioned by the NCTA – Under 35s research completed by Olive Insight, Customer Journey completed by MRG at Bournemouth University, Business Events completed by CHS Group and Coast Media, Health and Wellbeing by BDRC and Seasonality by MRG at Bournemouth University.

The 2015 report: Key findings and context

***Coastal Tourism 2015* was the first comprehensive report to examine and pull together all the known research on coastal tourism. This report will build on those findings, updating some of the research with more up to date figures. However, there are parts of the original report that are still current. Below are some of the key findings that are still relevant in 2016 and help to understand the nature of tourism on the coast.**

- Historically, seaside tourism has been the largest sector of the domestic market, but the growth of city breaks in particular has meant that market share had begun to decrease, and whilst coastal tourism is still growing, the rate of growth is slower than national tourism averages. However, at a local level there are a handful of destinations achieving significant growth

- Visitors to the seaside tend to be loyal and satisfied customers. However, the perceptions of non-visitors remain less positive, particularly for more traditional seaside destinations and coastal resorts that are often perceived as "tacky and dated"

- The seasonality of coastal resorts varies widely and at national level remains largely unchanged since 2008. Towns with a higher percentage of hotel and guest house accommodation, have managed to stretch the season quite significantly compared to resorts dominated by self-catering and holiday parks

- Coastal tourism is a significant employer[1], and in England and Wales directly supports some 210,000 jobs estimated to be worth around £3.6 billion, which is similar to the telecoms sector

- The coast is dominated by independently owned tourism businesses[2], predominantly SMEs, and has very little corporate representation (less than **3%**), which makes the coordination, delivery and speed of change difficult, but could be an opportunity to market distinctive and unique products on the coast

- Business support and training initiatives for coastal tourism businesses must be bite-sized, available online or run at times to accommodate different types of businesses. Offering flexibility and ensuring support is specific to the tourism industry is key to gaining participation. The best results are achieved when support is delivered 1-2-1 and tailored to the business' individual needs

- Staffing is one of the most significant and on-going challenges for coastal tourism businesses

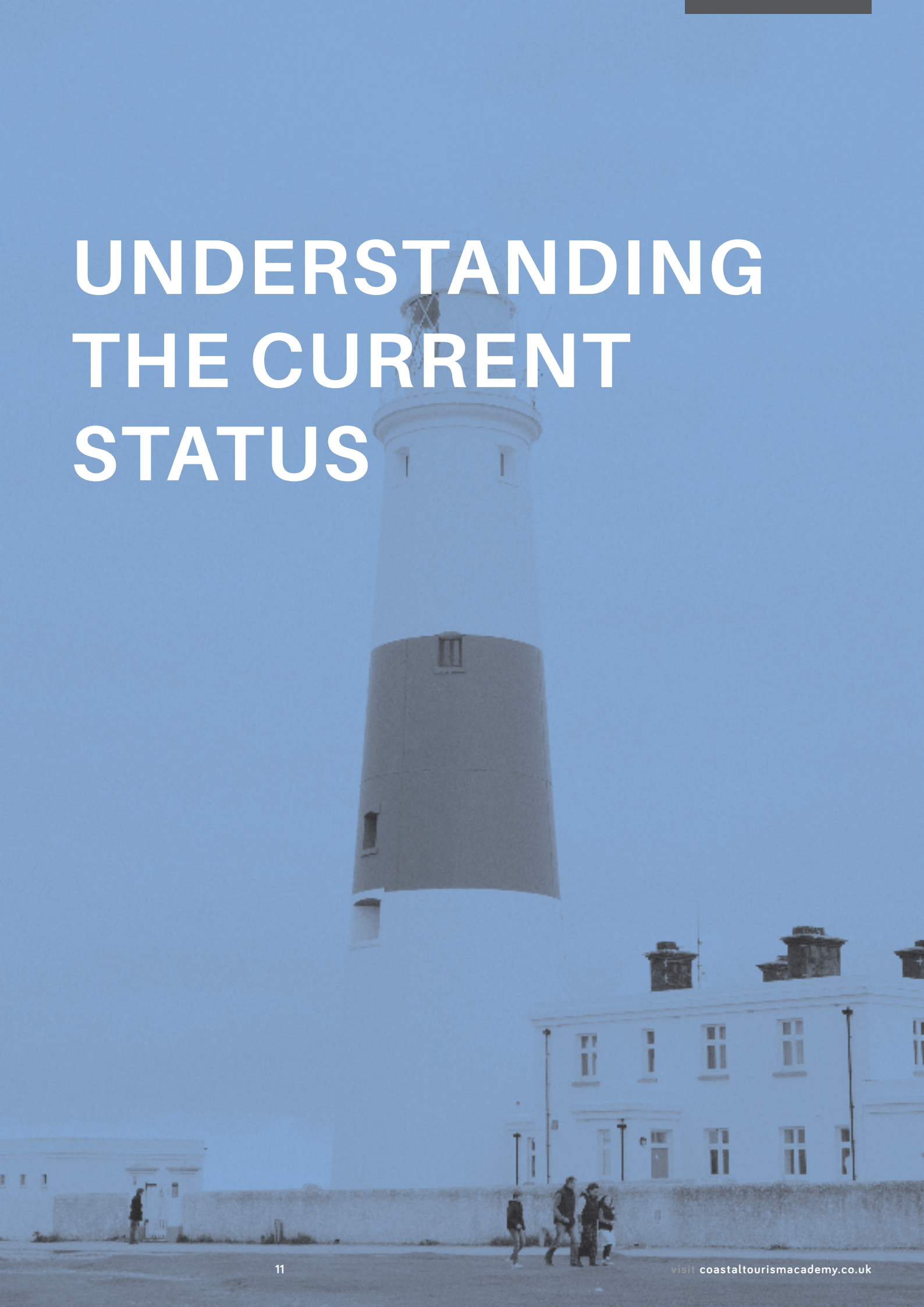
- Pressures on local government funding in particular are a key concern due to the social make-up of coastal communities as emphasised in a recent ONS publication[3]. The report highlighted that coastal communities have a higher than average population with a long-term health problem, some of the most elderly populations in the country (**20%** over 65, compared to **16%** national average), **31%** of residents working part-time and a net outflow of commuters

- Local authority spending cuts have inevitably had an adverse impact on tourism delivery on the coast, although the full effects have been mitigated to a degree by private-sector support for destination-based marketing activities. Destinations have voiced concern over the implications for delivery of visitor services, research and development, business support and skills programmes, and have concerns about the destination's long-term ability to encourage and enable a more strategic destination management approach

A key finding from the 2015 report was that the dominance of SMEs combined with increased pressure on local authority spending, makes the delivery of change more challenging on the coast. Yet there are significant opportunities for growth.

1 Seaside Towns in the Age of Austerity: Recent Trends in Employment in Seaside Tourism in England and Wales (2014), by Christina Beatty, Steve Fothergill and Tony Gore
2 NCTA research (reference Coastal Tourism 2015)
3 2011 Census: Coastal Communities (28 October 2014), Office for National Statistics

UNDERSTANDING THE CURRENT STATUS



Coastal domestic tourism at national level

The UK tourism industry continues to be a national success story, with growth in job creation of more than **11%** in the last five years, twice the rate of other sectors[4]. However, the pattern of growth on the seaside in England is a more mixed picture.

Valued at c.£8 billion to the UK economy for domestic overnight and day trip spend in 2015, coastal tourism is a significant part of the economy and accounts for **31%** of all domestic overnight holiday trips and **8%** of all tourism day visits.

Coastal destinations have seen an increase in overnight spend and volume in the last 12 months, and the seaside has regained the top spot for market share from city breaks, but the margin is very small and cities remain a close competitor. Day visits to the seaside have seen a small drop in the number of tourism day visits and spend, yet the seaside's market share of day visits remains steady at **c.8%.**

The trend towards shorter breaks is finally reaching the seaside, with a shift in length of stay and a three percentage point increase in short breaks of one to three nights at the seaside over the past two years. Seaside trips still continue to have a much higher proportion of mid-length stays (four to seven nights) than other trip types, but since 2008 there has been a long-term trend towards a decrease in the length of stay, with the seaside average now at 4.1 nights[5]. This change to embrace the short breaks market and wider consumer trends has taken longer to be adopted on the coast, but this recent shift is evidence that change is now happening and seaside accommodation is more flexible on start days and length of stay, making it better able to accommodate the growing short breaks market.

SEASIDE - KEY STATISTICS

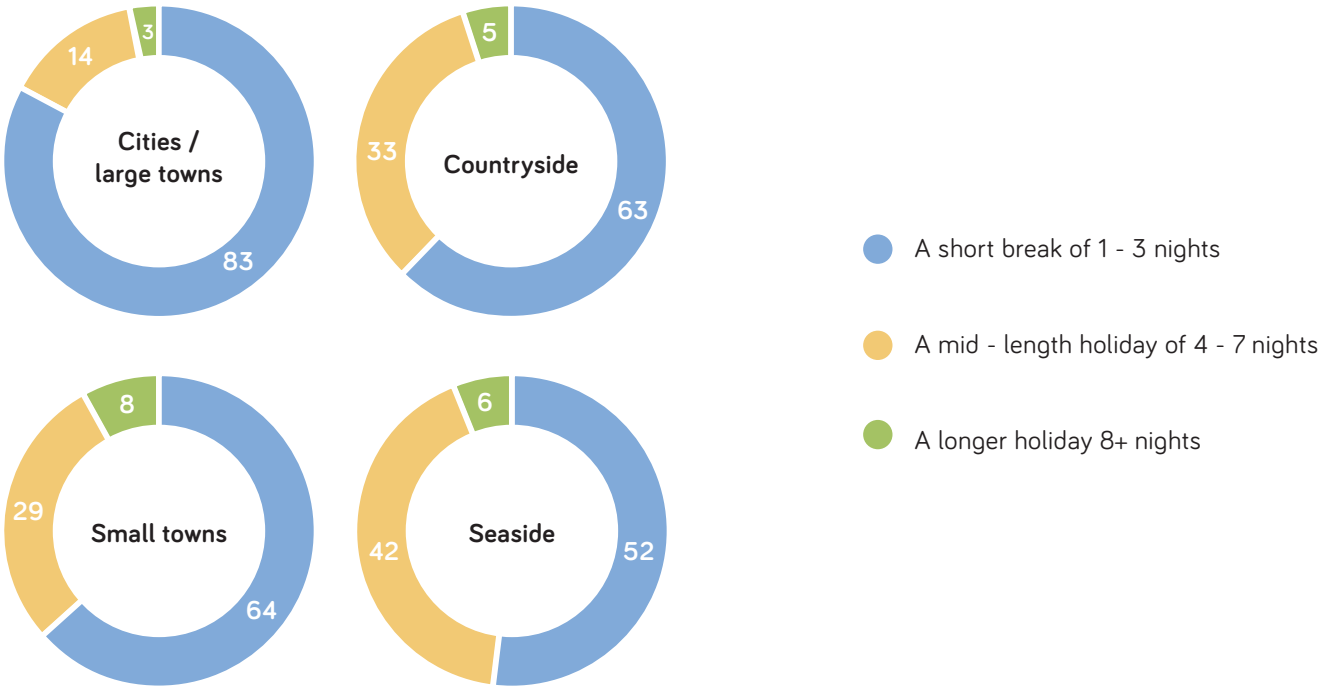
	Domestic overnight (all trips)		Domestic overnight (holiday trips)		Tourism day visits	
Trips	19.4m	18.9%	13.7m	30.6%	106m	8.2%
Nights	71.3m	23.8%	55.3m	37.8%	n/a	n/a
Spend	£4,354m	22.2%	£3,443m	32.1%	£3,713m	8.4%

Source: 2015 GBTS & GBDVS data

It is important to note that the above statistics do not include international visits and visiting friends and relatives, the latter of which is believed to be particulary important for coastal towns.

4 ONS Tourism Employment Summaries: Characteristics of Tourism Industries, 2014 (3February 2016) by Sean White, Office for National Statistics, available at http://bit.ly/1Twk20B
5 2015 GBTS and GBDVS data analysed by TNS for NCTA

LENGTH OF STAY BY TYPE OF BREAK



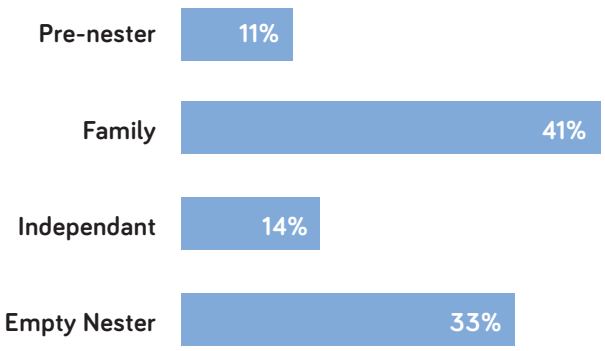
Source: 2015 GBTS

Seaside breaks have seen a significant increase over the last few years of AB socio-economic groups visiting the coast. Although still lower than other trip types, the gap to other types of break, city breaks in particular, is much lower than previous years. The coast does still have a stronger appeal to C2DE socio-economic groups than other types of break though, and so this group remain a key market.

The appeal of the seaside for families has grown in recent years, now representing the largest proportion of coastal visitors. This perhaps reflects the trend for greater inter-generational breaks and a strong push from coastal destinations to develop product for the family market. A reduction in the percentage of empty nesters (over 55s) has been evident since 2013, which mirrors an increase in consumer confidence and a return to overseas breaks. However empty nesters are a significant market for the coast in the off-peak season and therefore represent a key growth opportunity. The NCTA is conducting new research into this market to understand how to attract and retain empty nesters in the off-peak season.

In line with research conducted by the NCTA, young independents (under 35s) are the smallest percentage of visitors to the coast. Attracting and satisfying this market requires a concerted effort by coastal destinations and businesses. See the Opportunities for Growth section for further details on this market.

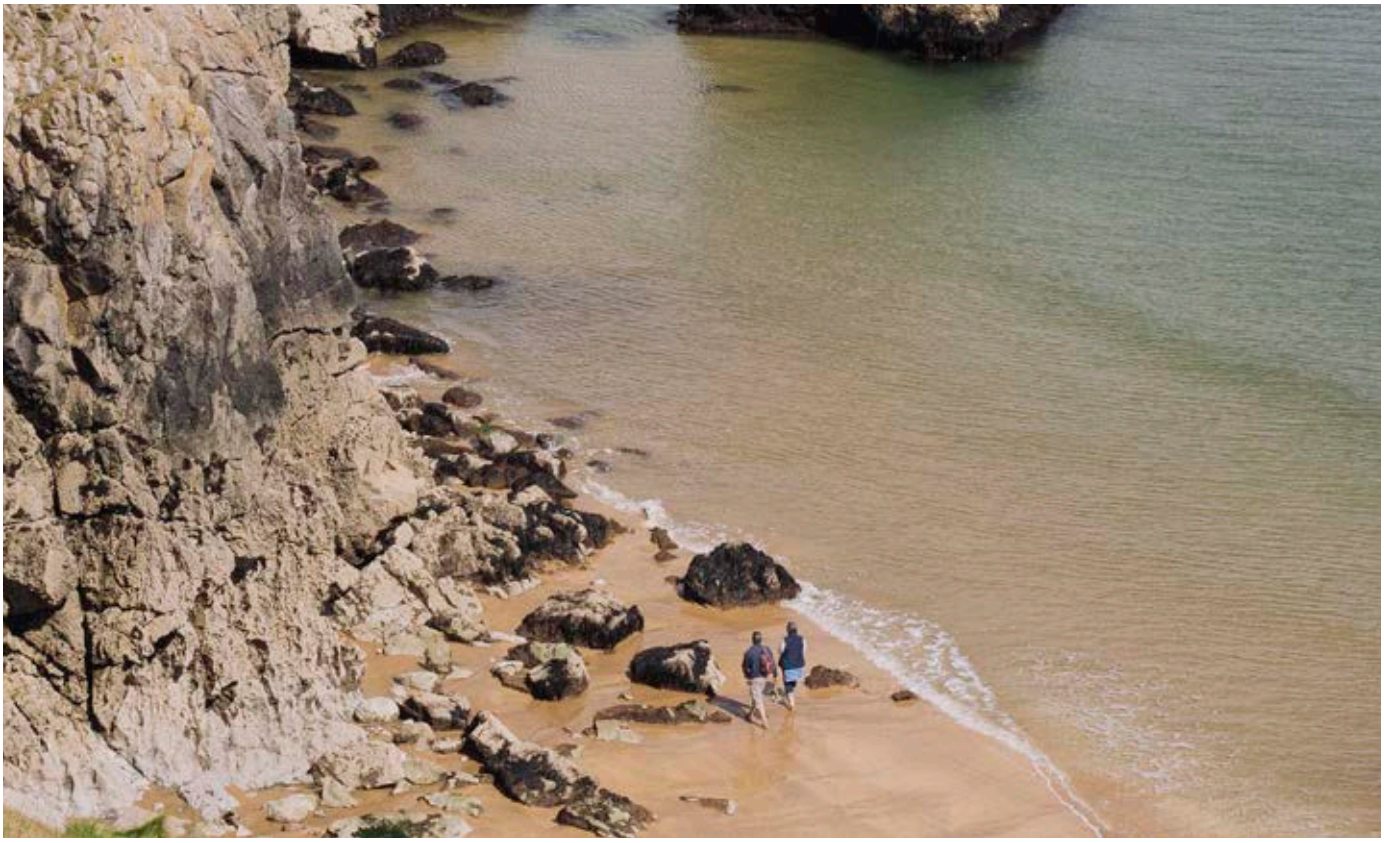
VISITOR PROFILE (% OF TOTAL)



CLASSIFICATION

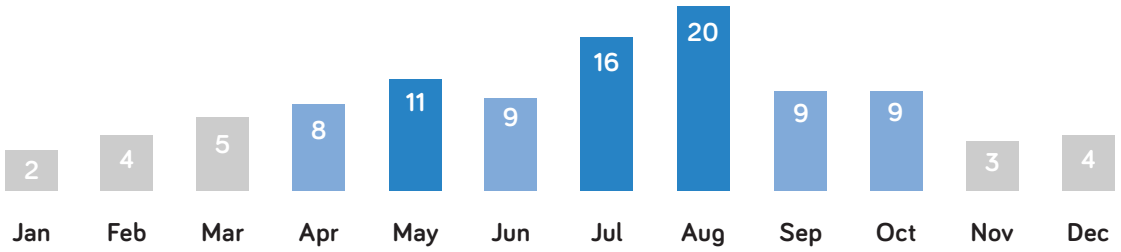
Pre-nester	16 - 34 yrs	no children
Family	16 - 54 yrs	with children
Independant	35 - 54 yrs	no children
Empty Nester	55 + yrs	no children

Source: 2015 GBTS



Seasonality of overnight breaks to the seaside remains a critical issue with little change since 2008. More than one third of all breaks are taken in July and August (**36%**) and almost three quarters between May and October (**74%**). Minor seasonality changes can be seen since 2013 including a slight increase in trips taken in February and December, reflecting trends for short breaks around Christmas and the February school half term, and a decrease in visits in June and September. This potentially reflects the reduction in the empty nesters market (for whom these are key months of travel) and the impact of the so-called "Gove effect" restricting absence from school to school holidays only. The decrease in visitors in June and September is worrying and could present real issues for the coast if this trend continues.

TIME OF YEAR (% OF TOTAL)



Source: 2015 GBTS

For a more detailed report on the national picture see the NCTA report *Seaside Tourism in England*

Research at local level

Understanding the nature of coastal tourism at a local level is a challenge. The techniques employed by local authorities to measure tourism vary by destination, and so whilst individual destinations have comparable data across a number of years, it is not possible to compare across destinations. The data collected is also based on local authority boundaries or DMOs, the size and structure of which vary widely. If national data is analysed at local authority level, issues surrounding sample size and accuracy then start to become apparent.

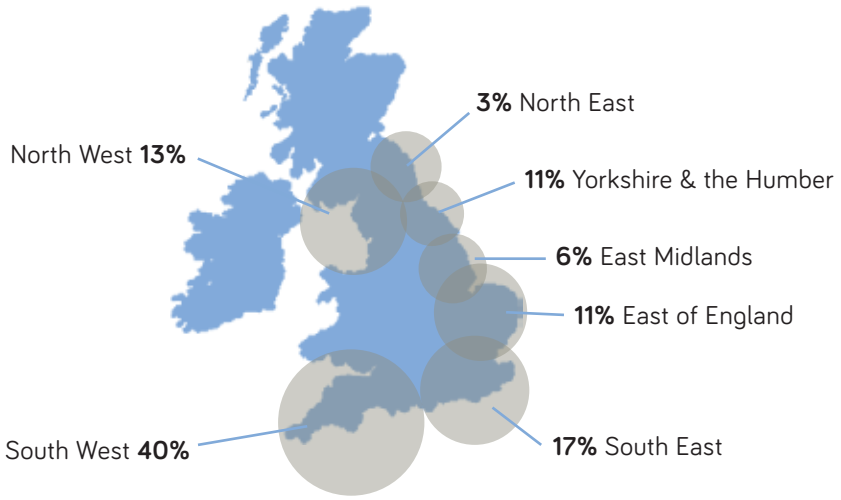
Gathering the data that does exist at a local level, it is clear that the success of destinations is a mixed and unbalanced picture. Data produced in destination using STEAM or Cambridge economic impact models shows a different picture to national data available at local authority level.

In reviewing published STEAM or Cambridge economic impact evaluations for different destinations and media releases, destinations such as Bournemouth[6], East Lindsey (including Skegness)[7], Brighton[8], Scarborough[9], Torbay[10], Thanet[11] and Eastbourne[12] are reporting annual growth in tourism either in spend or volume. Yet reviewing Visit England's domestic overnight data at local authority level[13] using three year rolling averages from the GBTS survey, the picture looks quite different and many coastal destinations are shown to be in decline, although this data only covers domestic overnight tourism and not international, day trip or VFR related travel. This highlights the challenges with understanding what is truly happening at a local level.

To help add further detail to the local picture, the NCTA has commissioned a coastal tourism *Coastal Business Monitor* survey which will provide a snapshot barometer of what is happening on the coast. The first results of this are due summer 2016.

At a regional level, data is more accurate and it is possible to see where domestic overnight seaside trips are taken[14]. The South West is the most visited region (**40%**) for domestic visitors.

% OF SEASIDE TRIPS TAKEN



Source: 2014 GBTS

6 "A snapshot of Bournemouth's Visitor Economy" available at http://coastaltourismacademy.co.uk/resource-hub/resource/facts-and-figures-about-bournemouths-visitors
7 East Lindsey Economic Impact Study available at http://www.e-lindsey.gov.uk/article/2118/Tourism
8 The Economic Impact of Tourism Brighton & Hove 2014, Tourism South East – available at http://www.visitbrighton.com/partners/strategy-and-research/tourism-research
9 The Economic Impact of Tourism on Scarborough District 2012, Tourism South East - available on http://www.discoveryorkshirecoast.com/industry/tourism-statistics
10 Torbay official statistics 2014 available at http://www.englishrivieratourism.co.uk/official-statistics.php
11 Thanet Economic Impact 2013 available at http://www.visitkentbusiness.co.uk/tourism-business-support-and-advice/opportunities/ecnomic-impact-of-tourism-in-kent
12 "The Economic Impact of Tourism Eastbourne 2014" available at http://www.visiteastbourne.com/tourism/Business-toolkit.aspx
13 Visit England data table available at http://www.visitengland.org/insight-statistics/whatsnew/Cont.aspx
14 GBTS 2014

International visitors to the coast

The NCTA has commissioned a review of all the data relating to international visitors to the coast to better understand the scale of this market, key source markets and opportunities for growth. The table below highlights some key insights relating to international visitors to the English coast.

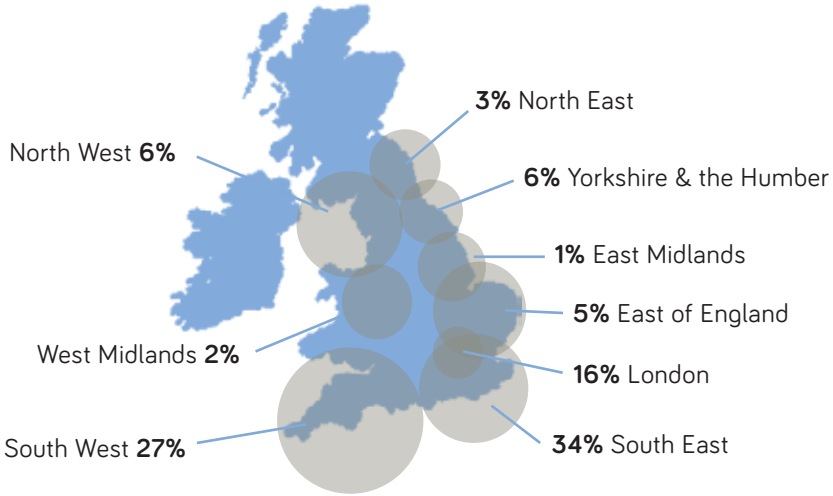
Area	England coast	All of England
Proportion of visits	15%	100%
Number of visitors	c.1.8 million	11.9 million
Gender	51% male, 49% female	50% male, 50% female
Age	54% aged 45+	40% aged 45+
Average Party size	2.24	2.09
Income	43% earn £50k+	45% earn £50k+
Holiday length	82% 4+ nights	60% 4+ nights
Average 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 to the coast were interested in activities that were broadly similar to those undertaken by all international visitors to England[15], they include shopping (**81%**), parks and gardens (**73%**), visiting countryside / villages (**72%**), castles / historic houses (**72%**) and pubs (**69%**).

The South East and South West are the most visited regions for international visitors, although a high proportion of visitors to the coast stay in London (**16%**) and therefore represent a key growth opportunity for the coast.

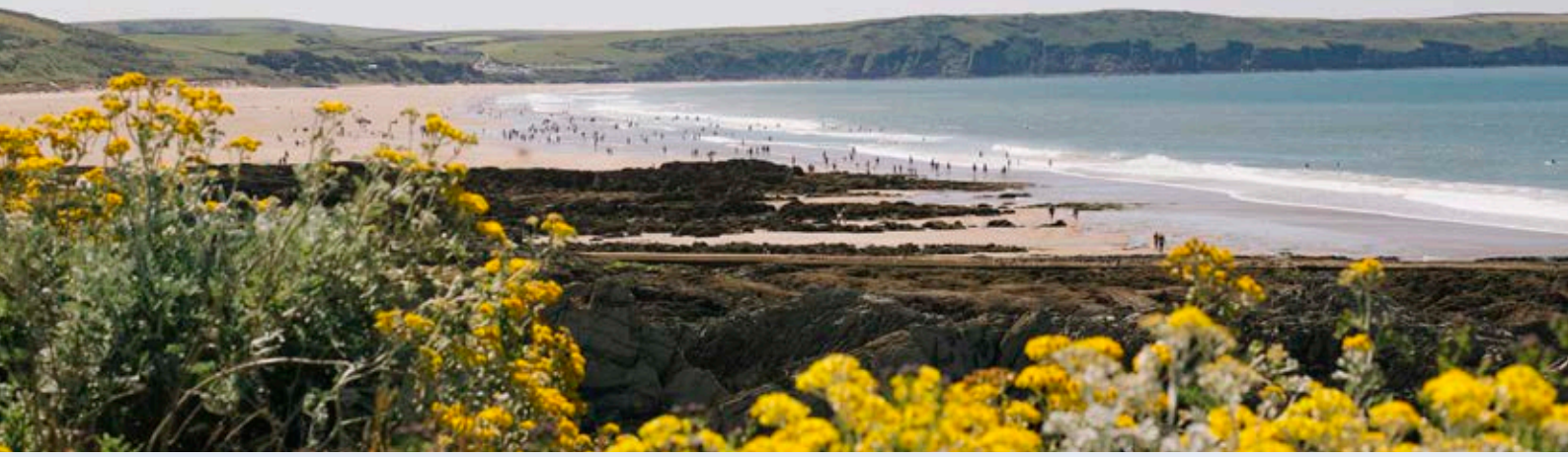
BREAKDOWN OF TOTAL ENGLAND COASTAL VISITORS BY REGION (%)



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

15 IPS 2011

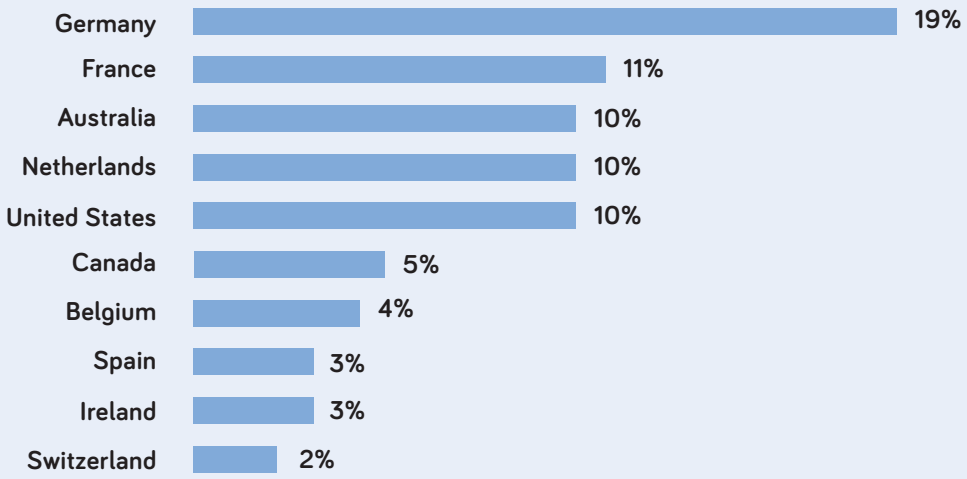
German visitors were most likely to have visited the coast in absolute terms (19%), followed by France, Australia, Netherlands and USA.



A study commissioned by VisitBritain, found that when considering which types of places international visitors were most likely stay in[16], the most popular responses were 'Capital City' (**47%**) and 'Historic British Cities' (**40%**). Less than one-third said they would like to visit 'Coastal areas of Britain'.

From further analysis of the options chosen by respondents, assumptions can be made about the type of itineraries they might choose. For those who were most likely to stay in 'Coastal Areas', they also showed interest in a visit to a 'Capital City' (**39%**), a 'Historic British City' (**29%**) and 'Remote areas of Britain' (**25%**). These could present opportunities to package the coast and create itineraries that appeal to 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)

16 GfK Anholt Nations Brand Index, 2015 available on www.visitbritain.org

ENCOURAGING VISITS BEYOND LONDON

Research for VisitBritain's 2013 report entitled *London and Beyond* was undertaken in four markets, France, Germany, Norway and USA, and outlined three key barriers to visiting outside London that are relevant to the coast:

Practical concerns

including lack of time as there's too much to see in London and transport concerns

Lacking experientialism

a need to market the coast as a destination offering unique, authentic experiences as well as headline attractions and sights

Low awareness

almost half of visitors (**44%**) claimed they had no knowledge of Britain's coastline

The report also shared potential motivations for going beyond London, with the most common reason that 'history is spread across the country' (**81%**), followed closely by 'diverse regions which make for an interesting holiday' (**80%**). 'Coastline is unique and beautiful' (**66%**) was seventh, which highlights the lower awareness and understanding of its offer.

DEVELOPING THE ENGLISH COASTLINE AS A PRODUCT FOR INTERNATIONAL MARKETS

Generally, awareness of the coast among international visitors is low, and raising it should be a priority for coastal destinations. Key markets are northern Europe and long-haul English speaking countries, but in particular Germany and Australia may be easiest to target. For older audiences focusing on the opportunity to relax and for younger audiences the activity-based, experiential offer of a coastal holiday.

In addition, the coast needs to offer benefits to visiting that draw on key drivers, such as iconic natural beauty, authentic local food and using the UK's strong historical brand to create 'tick-box' experiences. However, the coastline may also benefit from a point of difference such as soft adventure or wellness, although the strength of these is untested.

Finally the coast needs to overcome the barrier of accessibility, practical transport concerns and the 'effort' required to get to the coast with a focus on creating itineraries or packages to make it easy to visit.

Employment in coastal tourism

The recent Office for National Statistics[17] report on employment in the tourism industry nationally shows that employment in tourism has grown by **11.7%** over the five years to 2014, more than double the rate of growth in non-tourism related industries. The total amount employed now stands at 2.97 million, with the greatest growth witnessed in accommodation and food and beverage activities.

At a coastal level, the most recent study is still the report by Sheffield Hallam University into employment in the coastal tourism industry published in 2014 – it revealed that the industry remains a substantial and growing employer directly supporting 210,000 jobs across 100 resorts.

It is important to note though, that although coastal tourism employment is growing, the national growth rate is significantly higher and therefore support is needed to make the most of the industry's potential to ensure it is not left behind, especially given the scale and importance of coastal tourism to the overall visitor economy.

17 Tourism employment summaries: Characteristics of tourism industries, 2014 (3February 2016) by Sean White, Office for National Statistics, available at http://bit.ly/1Twk20B

Key issues affecting coastal tourism businesses

TRAINING AND SKILLS

As previously reported by the NCTA, coastal tourism businesses have long expressed issues surrounding recruitment, induction, employee engagement and retention. In 2015 the NCTA commenced a pilot project funded by the UK Commission for Employment and Skills (UKCES) to find ways of addressing these challenges. As part of the project, the NCTA commissioned research with 270 businesses in Brighton & Hove, Eastbourne and the Isle of Wight. They represented a mix of hotels, guest houses and food and drink businesses. The findings were largely similar to previous studies undertaken by the NCTA in Bournemouth and Dorset.

THE KEY STAFFING ISSUES FACING COASTAL TOURISM BUSINESSES WERE:

Source: Understanding Employment Issues in Coastal SMEs 2015

In addition the research found that:

- **12%** of staff employed came from overseas, with hotels being most likely to employ international staff.
- A quarter of staff are under 25 rising to **36%** of staff in restaurants.
- Chefs remain the most difficult role to recruit (**24%** of all businesses and **44%** of food and drink businesses). Other roles difficult to recruit were housekeepers, chambermaids (particularly for guest houses) and cleaners.

There is a general perception that there is a shortage of skills in the hospitality sector but it is soft skills that are considered more important to tourism businesses than specific job related skills. All businesses agreed that the following attributes were most important when looking for new staff:

- **Positive attitude**
- **Being adaptable**
- **Customer focussed**
- **Well-presented**
- **Good spoken English**

Overcoming the barriers to training and skills participation, particularly in SMEs, will be key to driving improvements.

When considering employee engagement and work-based policies, the research found positively that:

- **86%** had flexible working practices
- **77%** had a formal staff induction
- **74%** had a customer service policy

However:

- Fewer businesses had more proactive processes in place such as team building days (**24%**), staff surveys (**19%**) or staff forums (**15%**)
- Just under a third of businesses identify training and development needs through a formal appraisal or review process and **32%** through a manger's observation
- Only **19%** had a dedicated budget for staff training

Research from People 1st looking at the hospitality industry nationally supports the NCTA's Research.

In a recent report *The Skills and Productivity Problem*[19], People 1st suggest that more attention should be focussed on staff retention, which would not only tackle the industry's recruitment problems, but also increase the competency of the hospitality and tourism workforce. They suggest more thought should be given to employee engagement and the promotion of career progression pathways to both the current workforce and potential employees. The report highlights that **21%** of hospitality and tourism businesses note that staff lack essential skills, compared to **15%** in all UK businesses. The report also explores the productivity issues facing the sector, claiming there is a "revolving door" of staff that creates skills gaps, with over two-thirds of restaurants and hotels (**68%**) not having a full complement of staff.

People 1st also highlight the importance of 'soft skills'[20]. Their report notes that four of the top five skills applicants reported as lacking, are soft skills, and specifically customer handling expertise, a gap highlighted by **61%** of businesses.

Overcoming the barriers to training and skills participation, particularly in SMEs, will be key to driving improvements. Through the programmes and support that the NCTA has been offering since 2013, the NCTA has found that in order to engage businesses and increase participation, even on activities that they have stated as a priority, business support needs to be tailored to the tourism industry - bite-sized, and available online or run at times to accommodate different types of business' flexibly. The best results are achieved when support is delivered one-to-one and tailored to the business' individual needs.

The best results are achieved when support is delivered one-to-one and tailored to the business' individual needs.

19 http://www.people1st.co.uk/Research-policy/Research-reports/The-Skills-and-Productivity-Problem
20 'Overcoming the Soft Skill challenge' 2015, People 1st available at http://www.people1st.co.uk/Research-policy/Research-reports/Monthly-insights-reports

Coastal Destination Management Organisations and the local picture

The landscape of destination management in England over the last few years has changed dramatically at a national and local level. The NCTA approached 30 coastal Destination Management Organisations (DMOs) to understand more about their priorities and challenges.

The most significant challenge facing all destination organisations on the coast was funding.

This was both in terms of continuing to fund current activity and funding to support additional projects and priorities. Concerns were also expressed over the importance of continued investment in key assets and the public realm, for example, high streets, beach management and parks, which are the main attractors for coastal destinations.

KEY CHALLENGES FACING YOUR DESTINATION ORGANISATION

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

Source: NCTA Destination Management Survey 2016

The change at a national level to focus increasingly on international visitors and less so on the domestic market was a key concern for a number of destinations (**60%**), which is understandable given the high dependence on domestic visitors for many coastal destinations.

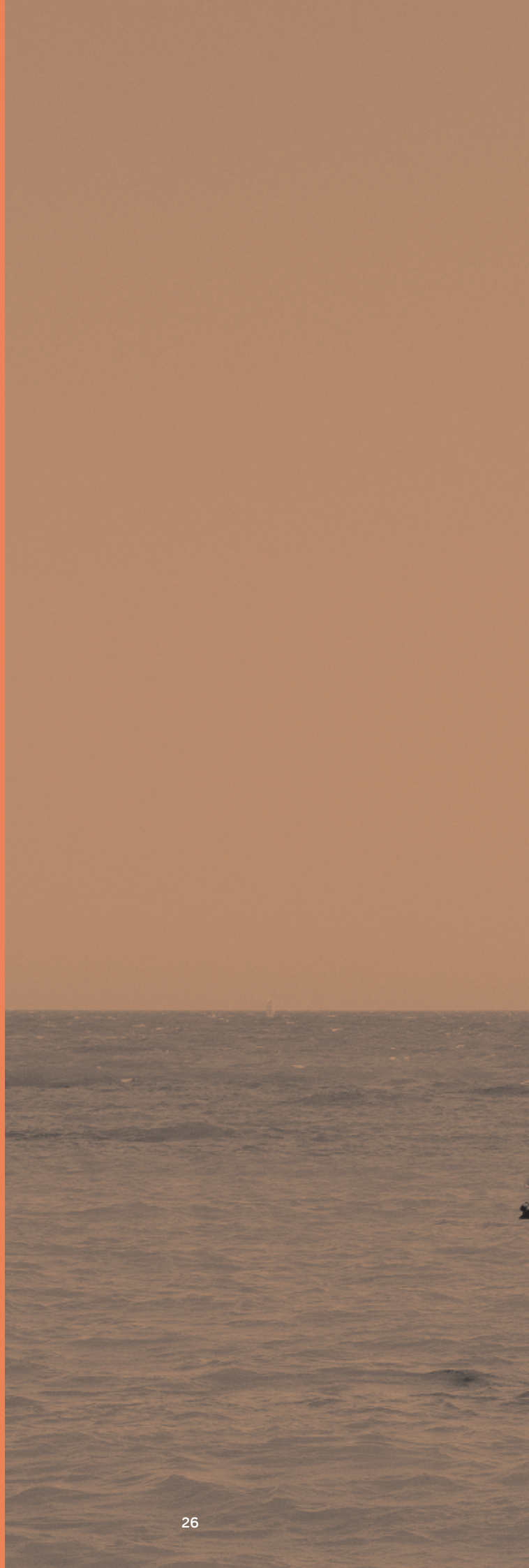
When asked about priorities for development within their destination, the following were considered the top 10 priorities in order of importance:

- Improving the overall visitor experience
- Attracting new visitors and markets
- Supporting local businesses
- Improving customer service
- Reducing seasonality – as an opportunity for growth
- Improving product knowledge in the destination
- Creating new reasons to visit
- Identifying suitable product development and marketing opportunities for your destination
- Collaborative working within the destination and nationally, to share best practice and promote a common vision for the destination and coastal tourism
- Encouraging repeat visitors

Understanding how improving the visitor experience across a destination can lead to increased recommendations, repeat visits, spend and length of stay, was stated as a "very important" priority for development among **78%** of destinations and "very" or "quite important" among all destinations.

The understanding of the importance to improve the experience ahead of attracting new markets is sensible, but with private sector businesses focusing increasingly on marketing and attracting new visitors, and the threat of closure for some destination organisations due to pressures on funding, there is the potential in the medium-long term for a lack of strategic planning and lack of focus on improvement in the quality of experience.

These issues and priorities are not necessarily unique to coastal destinations, but when considering the nature of coastal communities with a higher than average level of SMEs, pressures on public spending for statutory requirements like housing and social care, it becomes apparent that these issues are more extreme on the coast and destination organisations are vital for coordination, marketing and strategic development of coastal destinations.



CONTINUING INVESTMENT ON THE COAST

In the *2015 Coastal Tourism* report, the NCTA considered some significant success stories in coastal tourism development over the past ten years, with examples of regeneration activities, successful destination marketing campaigns and the impact of funding schemes on the coast. In the last year, there have been a number of key announcements that will impact the future of the coast.

COASTAL COMMUNITIES FUND

The announcement in 2015 of an additional £90 million for the continuation of the Coastal Communities Fund until 2020/21 has been widely celebrated. The Coastal Communities Fund is a dedicated funding stream for development on the coast which has been awarding funds since 2012. To date it has invested £118.5 million in 211 projects.

Across the UK, £64 million has been invested in tourism related projects[21], which represents **69%** of the fund.

Many are capital projects for development of:

- new property and infrastructure
- coastal paths and walkways
- heritage railway services
- upgrading of heritage or visitor centres

Based on forecast figures, it is expected that this investment through the Coastal Communities Fund will create or safeguard 18,000 jobs on the coast, support 12,000 businesses and deliver a return on investment of £8 for every £1 invested[22].

In addition to the Coastal Communities Fund, other initiatives launched by the Department for Communities and Local Government[23] include support for 118 Coastal Community Teams to develop local economic plans to drive growth and boost prosperity in coastal areas and the £3 million Coastal Revival Fund to support the revival of heritage facilities that benefit the community.

BLUE NEW DEAL

The Blue New Deal, launched in June 2015, is an initiative spearheaded by the New Economics Foundation (NEF) a leading think tank promoting social, economic and environmental justice. The initiative recognises the high levels of inequality, increased unemployment and lower wages experienced in coastal communities coupled with damage to the natural environment that these communities depend on.

Blue New Deal sets a vision for revitalising coastal communities, supporting good jobs and protecting the natural resources they depend on.

Bringing together a range of economic sectors, organisations and individuals committed to the Blue New Deal vision, four separate working groups have been meeting regularly to identify challenges and opportunities on the coast focussing on fisheries and aquaculture, energy, tourism and coastal management. The findings of these groups will be brought together in an Action Plan due to be launched in October 2016, which will identify policies, incentives and practical solutions to turn the Blue New Deal into reality.

For more information including examples of sustainable solutions for economic development on the coast see:

www.bluenewdeal.org/

21 Coastal Communities Fund "Annual progress report 2015" available from https://www.gov.uk/government/publications/coastal-communities-fund-annual-progress-report-2015
22 Coastal Communities Fund "Annual progress report 2015" available from https://www.gov.uk/government/publications/coastal-communities-fund-annual-progress-report-2015
23 Coastal Town Teams https://www.gov.uk/government/news/coastal-communities-set-to-boost-local-economies-with-over-100-plans

FIVE POINT PLAN FOR TOURISM AND THE DISCOVER ENGLAND FUND

In July 2015 the Government launched its five point plan for tourism, *Backing the Tourism Sector*[24]. The plan highlights the importance of tourism to the UK economy and outlines the Government's commitment to promoting the UK to international tourists and improving the visitor product, specifically it focuses on:

- Tourism landscape
- Skills and jobs
- Common sense regulation
- Transport
- a GREAT welcome

On 21 July 2015, the Government response to the DCMS Select Committee inquiry into Tourism was published[25]. Specifically related to coastal tourism issues, the Government confirmed the continuation of the Coastal Communities Fund and a commitment to "*continue to work on a national scale to help coastal towns and communities to thrive, supporting their development and sharing best practice by engaging with businesses and destinations around the coast.*"

The Discover England Fund, announced in November 2015, is a new £40 million product development fund for tourism in England. Though not specific to the coast, the new fund will focus on delivering product development improvements and creating new bookable product that will hopefully attract international markets and support growth in domestic tourism.

For further details see: **www.visitbritain.org/discover-england-fund-overview**

24 DCMS July 2015 available from https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/446167/Tourism_-_A_Five_Point_Plan.pdf
25 Tourism: Government Response to the Committee's Sixth Report of Session 2014–15 http://www.publications.parliament.uk/pa/cm201516/cmselect/cmcumeds/382/382.pdf

OPPORTUNITIES FOR GROWTH & FUTURE CONSIDERATIONS

Targeting key sectors

Since its inception, the National Coastal Tourism Academy has undertaken research and identified a number of different market sectors that have opportunities for growth and are a good product market fit for the coast.

For the full reports on each of these areas visit:

coastaltourismacademy.co.uk/resource-hub

On the next page are some of the headline opportunities and statistics from the 2015 report

SEASONALITY

What are the key opportunities to boost off-peak business on the coast?

- Pre-family and empty nesters (over 55s) are attracted by 'top-up travel' between main holidays
- Targeting regional and local residents in off-peak periods for short breaks and day trips is an often overlooked segment, but particularly important for restaurateurs and attractions
- Making sure the coast is 'open for business' and addressing the perception that traditional seaside resorts simply 'shut down' outside the summer season
- Product development should focus on soft adventure (walking, cycling), culture and, where appropriate, positioning the destination as an easily accessible base to explore the surrounding area

HEALTH & WELLBEING

A significant growth market globally but what are the opportunities on the coast?

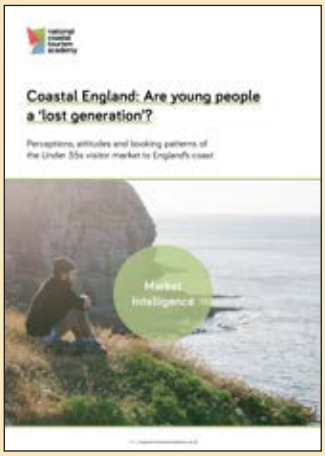
- In the UK one in five people take a dedicated wellness break each year, yet it represents only **8%** of trips on the coast and this represents a significant growth opportunity
- Notably a coastal setting is preferred to a rural countryside setting by **59%** of those seeking a dedicated UK wellness break
- Wellness travel is also less seasonal, **66%** of trips are taken between November and April

BUSINESS EVENTS

A largely buoyant but highly competitive market segment

- Business Events travellers spend on average **72%** more than leisure travellers and are far less seasonal
- Many coastal destinations could align to 'secondary' smaller and regional business events as well as the national and regional associations. Delegate spend in these markets can be between £120 and £461 per head and they comprise a mainly domestic market
- Key to success is altering perceptions among buyers that a coastal destination is a 'place to do business', building understanding of this market needs an undertaking of a detailed product-market fit exercise

In the last year, the NCTA has continued to explore other opportunities for coastal development and the following research summaries represent key opportunities for the coast.



So how do the under 35s currently view the English coast? The research showed that **63%** of this age group had visited the coast at least once in the past three years and shorter trips were viewed as a particularly good option for visiting.

Coastal England: Are young people a 'lost generation'?

New NCTA research has revealed that there is a significant growth potential for the English coast from the under 35s market. Contrary to fears, this segment is "not a lost generation but an unaware and uniformed one", with a lack of knowledge of the English coast's offer.

For the full report visit **coastaltourismacademy.co.uk/resource-hub**

Furthermore, almost everyone who has visited in the last three years would go again. However, a significant one third is indifferent about it.

Overall, visiting the English coast is not front of mind for this age group, with **78%** saying that there are "lots of other places I am more interested in visiting" and **53%** declaring a lack of knowledge of what is on offer for them on the English coast. Positively, under 35s are not significant rejecters of the coast (only **9%**).

THE OPPORTUNITIES

Young adults take a variety of trip types which fulfil a different range of needs, and the English coast delivers in terms of fun, relaxation and bonding.

This means for quick wins, destinations and businesses wishing to attract under 35s should focus on attracting them for beach holidays, romantic breaks, family holidays and ultra-short breaks (one night).

However, mid to longer term - active holidays, adventure sports and wellness breaks offer the greatest potential for product development for this market.

More generally there is a great deal of work that can be done to increase visits among the **84%** of the under 35s market that are potential visitors – but they require very different strategies:

Enthusiasts (29%)

Frequent visitors who love the experience, often have children so providers need to focus on family friendly activities – which will in turn have a generational effect by providing positive childhood memories.

Enjoyers (24%)

Aware of the coast and visit it, but product development is required to improve their experience and satisfaction levels, as well as focussed marketing to raise awareness and motivate them to take action.

Elusives (31%)

This group need to be made more aware of the coast and its potential attractions to tempt them away from other holiday destinations

THERE IS A PERCEPTION THAT THE COAST IS GOOD FOR:

Fun

Doing traditional things, beach experience, bonding

An escape

fresh air, change of scene, reflection and relaxation

Nostalgia

time shared with parents and when younger

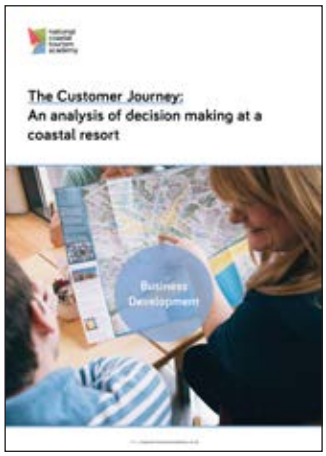
Shared culture & heritage

A very British experience

Understanding the customer journey

Although there's plenty of theory, relatively little is understood about how or why tourists decide to choose a particular coastal destination or how their experience can be influenced to boost repeat visits and increase spending. Using Bournemouth as a case study, the NCTA conducted research to understand more about the customer journey and by linking this data with other research has created a guide for use in other destinations.

The key findings from the work were the continued importance of personal recommendations for destination choice, an increase in last minute decisions, the high importance still placed on leaflets in destination to guide activities undertaken during the trip, and the increase in use of social media and smart phones to share experiences whilst still on holiday.


The Customer Journey:
An analysis of decision making at a coastal resort

In 2016 the NCTA will also be investigating:

- **Empty Nesters**
  (over 55s) as a target for off-peak travel

- **Activity based tourism**
  (including water sports, golf, walking and cycling)

NCTA research indicates that these areas could present significant opportunities for coastal growth given the right product-market fit for each destination

Facilitating growth on the coast

In addition to making research accurate and accessible, the NCTA believes that its work should be actionable and easily applied to the tourism industry in order to deliver growth in real terms. The following section focuses on the results and learning from some of the applied work that the NCTA has conducted with the tourism industry to deliver growth.

IMPROVING THE VISITOR EXPERIENCE

Managing the visitor experience has become increasingly important to businesses over the last decade, with **54%** of businesses planning to use it as part of their marketing[26]. Delivering an holistic and managed visitor experience throughout a customer's journey has proved to lead to success in individual businesses, such as Disney, where exceptional service is seen as an asset rather than a cost to the business[27].

Research shows that visitors who are highly satisfied with their customer experience are more likely to recommend their visit, return again, and stay longer.

With this in mind the NCTA undertook a review of the visitor experience elements across a coastal destination to understand the areas that needed improvement and how collaboration at destination level could lead to change. The NCTA then piloted a series of initiatives aimed at improving the visitor experience.

In total the NCTA piloted or facilitated more than 20 individual activities focused on improving the visitor experience over a three year period. The key successes from the visitor experience work related to initiatives developed for individual businesses. The most successful initiative was Bournemouth Ambassador, an online training programme that was offered free to front-line staff in the tourism industry. To date it has been used by more than 2,000 individuals, and has been warmly received by business. Evaluation completed in 2014 and 2015 found that **86%** of businesses agreed that they would recommend it to other businesses, and more importantly, **82%** agreed that staff were more knowledgeable as a result of completing the Ambassador programme.

Other popular initiatives included Customer Service training, Bitesize Bournemouth (an induction programme for staff new to the destination) and a series of Master Classes on topics relating to improving the visitor experience.

The independent evaluation of the programme, showed that the initiatives had been well received and had started the process of improving staff knowledge, confidence and expertise to enhance the visitor experience. As a result of the evaluation and feedback received, a condensed programme of activity was developed focussing on a few key initiatives that may be more manageable for other destinations to replicate and achieve similar results without heavy investment.

The details of the individual activities undertaken and full results of the programme of work are to be published on the NCTA's Resource Hub in 2016.

26 Pearlfinder Report (2015) http://standoutmagazine.co.uk/tribe-marketing-square-melon-partner-create-playmaker
27 Harvard Business Review (2014) "Advancing the customer experience" available from: http://www.disneyinstitutecollateral.com/files/Disney_Institute_HBR_AS_Final_Paper.pdf

INNOVATION

The Tourism Innovation Programme was set up to look at new ways of achieving growth in a tourism destination. The initial concept was to bring together industry leaders, innovative individuals and emerging new talent within the diverse industry to share ideas. It was intended that the ideas generated would help towards developing a destination, identifying new opportunities and methods that individual businesses, tourism representation bodies and local destination managers could utilise and take forward in partnership.

Overall the Tourism Innovation Programme was a successful initiative. It brought together talented members of the local tourism workforce who were largely engaged with the process and found the programme useful.

As outputs from the programme, three innovative ideas were presented to the Bournemouth Tourism Management Board (BTMB) and subsequently one of the ideas has been taken forward by the destination. Once tested a toolkit will be available on the NCTA Resource Hub.

Overall the key findings from the programme were:

- Tourism Innovation Programmes can encourage joint working and help a destination to work more cohesively
- It is important to engage a professional independent facilitator, not directly involved with the destination, who can help the cohort to 'think outside the box' but workshop content should also seek to achieve the balance between blue sky thinking and ideas that could realistically be introduced in an English coastal destination
- Careful selection of cohort members is essential to ensure they are engaged with the process and understand the time commitment involved to complete the programme
- Commitment and resources from the commissioning organisation need to be agreed upfront to act upon the ideas generated and demonstrate the significance of the programme to cohort members

In summary the NCTA believes there is potential to replicate the process to foster innovation in other destinations.

The appeal of the coast

The NCTA's review of the appeal of the coast in its 2015 report, highlighted the work of the University of Exeter Medical School[28] on the "small, but significant" improvement in health as a result of living by the coast, and Natural England's[29] research showing that the top reason for visiting the coast was to relax or unwind.

In 2015 the National Trust[30] commissioned research with YouGov to understand how the British public feels about the coast. Some 5,047 adults were interviewed in England, Wales and Northern Ireland. The results showed that **72%** of those interviewed said they visited the coast at least once a year. While on the coast the most popular activities were playing on the beach, walking along the coast, watching and looking for wildlife, looking out to sea and relaxing. These top reasons were similar to the study by Natural England.

Ninety-four per cent of the National Trust's respondents agreed with the statement that "It's important to me that Britain's coast is kept beautiful for future generations to enjoy" and **84%** that "The coast around Britain is a national treasure". Reasons they value the coast include peace and freedom (**53%**), fresh air (**72%**), getting closer to nature and wildlife (**39%**), for fun and enjoyment (**51%**) and the seaside culture (**35%**).

In addition, the survey revealed that **82%** agree that the coast was an important part of their childhood and **76%** agreed "being by the coast makes me feel alive". However a significant **42%** agreed that there were other places in the UK they would rather go and **56%** agreed that UK resorts are past their prime.

This research reaffirms the view that the UK coastline continues to command a strong affinity. However, like the NCTA's research on the under 35s market, other destinations are preferred over the coast when selecting a holiday destination and there is a negative perception for some parts of the product on the coast. These views don't reflect the large scale investment in public realm in coastal communities over the past five to ten years. This would suggest that there is a case for a concerted, collaborative effort to alter perceptions and build awareness of the wealth of product that is available, and reinvigorate national affection for and the desire to visit the coast.

A significant **42%** agreed that there were other places in the UK they would rather go.

28 Benedict W. Wheeler, Mathew White, Will Stahl-Timmins, Michael H. Depledge, "Does living by the coast improve health and wellbeing?" Health & Place, Available http://bit.ly/27yIOV4
29 Natural England (2012) Monitor of Engagement with the Natural Environment: The national survey on people and the natural environment. NECR094. Available from http://bit.ly/1TfeKcM
30 National Trust (2015) available from http://bit.ly/1WDQWzE for further info contact insight@nationaltrust.org.uk

Domestic leisure trends

BDRC's[31] annual Holiday Trends report has some interesting insights on the intentions, motivations and attitudes of British holiday makers. The key highlights were a decline in the intention for holidays of four or more nights – though domestic short breaks of up to three nights are still growing and **75%** of respondents will take a UK holiday of some variety. The other significant finding was the increase in safety as a key consideration in choosing the destination.

BDRC also found that there is a rise in bucket list holidays, particularly among under 35s, led by a strong desire for unique experiences. Four in five consumers were influenced by peers (word of mouth, social media or review sites) and experts (travel agents) in the decision making. Under 35s and families were most likely to engage in marketing activity.

Key considerations for coastal tourism were that the 'seaside' featured lower among predicted UK holiday types (at **24%**) than city or rural short-breaks, but faired better for a UK main holiday – although this may not reflect actual type of holiday booked, it indicates a preference for other types of holiday that the seaside will need to overcome. When asked what type of seaside break they preferred, small seaside towns (**55%**) and traditional seaside towns (**41%**) were the most popular options.

BDRC's research also included a series of questions on wellness holidays, the research showed continued growth in this segment, with one in five people saying they had taken a wellness holiday in the last year. Confirming the Health and Wellness research conducted by the NCTA, the Holiday Trends report revealed that the coast is still the preferred location for a wellness holiday, though countryside and city were gaining market share. Participation in wellness breaks is particularly high among the under 35 age group.

The BDRC research also gave insight into holiday planning and decision making, which showed that three in five Britons planned all or some of their in-destination activities before arrival. Once in destination, leaflets, chatting to locals and other holiday makers were the biggest influencers. These findings were similar to those of the NCTA's customer journey research.

Continued growth in the wellness segment, with **one in five** people saying they had taken a wellness holiday in the last year.

31 BDRC, "Holiday trends" 2016. Available at http://bdrc-continental.com/projects/holiday-trends-2016/

Summary of key opportunities and areas of focus

Bringing together the key findings from the research undertaken by the NCTA and others, the key opportunities and areas of focus for coastal tourism are:

- **Health and Wellness** - particularly off season and under 35s
- **Extending the season** – top up travel for empty nesters, young families and the pre-family market, growing the local day visitor market, and challenging the perception that the seaside closes for winter
- **Under 35s** – building awareness with a focus on ultra short breaks, fun and romance short term and longer term activity breaks and health and wellness
- **International markets** – raising awareness generally, creating compelling must see itineraries and making it easy to access
- **Family markets** - continuing focus and product development for the core family market and growing visits in the autumn and winter school holiday breaks (e.g. February half term)

More generally and across all themes, there is a clear need to raise awareness of the product available on the coast. Working collaboratively to raise awareness of the wealth of experiences that can be enjoyed throughout the year and altering perceptions of the coast is essential to achieve growth.

FOCUSSING ON THE FUTURE

Key to sustainable development in coastal communities is the creation of unique places and experiences

In the past year, the NCTA has further built its understanding of the issues and opportunities for continued growth of tourism on the coast. Yet, there is still much more that could be understood and the work of the NCTA to date has sparked new areas of interest and opportunities to be explored.

Priorities for continuing to extend knowledge and support growth should focus on:

FURTHER UNDERSTANDING OF THE MOTIVATIONS AND PERCEPTIONS OF VISITORS AND NON-VISITORS

Following the revealing research on the under 35s market, more in-depth analysis of coastal visitor and non-visitor profiles among other age groups is needed to understand motivations and perceptions of the coast and recognise barriers that need to be overcome to deliver growth.

RESEARCH ON OTHER GROWTH AREAS

There is a need to continue exploring opportunities for growth, including developing Activity tourism, Cultural tourism and Food tourism, as the next set of priority segments.

BUILDING A MORE ACCURATE AND REAL TIME PICTURE OF PERFORMANCE

This report has highlighted the vast variances in data at local and national level. Long-term, sustainable growth can only be achieved if a better understanding of performance is achieved in a timely manner with a consistent, comparable and reliable data set.

SHARING KNOWLEDGE AND BEST PRACTICE

Since 2013 there has been a significant investment in the coast through the Coastal Communities Fund along with other schemes. In addition, the work of the NCTA has significantly improved the understanding of coastal opportunities for growth and has piloted a large number of projects. With the announcement that the Coastal Communities Fund is to continue, it is important that this vast collection of knowledge and lessons learnt from other publicly funded schemes on the coast are shared to ensure that future investment is applied to best effect. The NCTA has begun this journey through its online Resource Hub and actively encourages other projects to share best practice.

PRODUCT-MARKET FIT – CREATING UNIQUE PLACES!

This report has highlighted a series of opportunities for development on the coast, and whilst there is a strong core issue to address awareness of the product, it is important to point out that key to sustainable development in coastal communities is the creation of unique places and experiences. As such, it is important that individual destinations undertake a detailed product-fit analysis to determine which of the opportunities for growth highlighted are most suitable for their destination. In so doing, a destination can build on and develop its current strengths to align to key opportunities and achieve its growth potential.

CONCLUSIONS & RECOMMENDATIONS

Valued at more than £8 billion, coastal tourism is a key contributor to the UK economy, the largest domestic overnight market segment and sustains 210,000 jobs.

Yet it is suffering from an awareness issue, particularly among under 35s and international visitors, but also more generally among non-visitors.

The work of the NCTA over the last few years has identified a number of key growth opportunities, and built an in-depth understanding of the visitor economy on the coast. At the start of the NCTA, there were perceptions of an industry in decline and a lack of understanding about how and where change was possible. Now, there is a clear understanding of the visitor economy, its potential and what is needed to achieve growth.

Below are some of the headline findings of the NCTA's work to date:

- Coastal tourism is undervalued and more important to the UK economy than is perceived
- Contrary to general opinion, it is not in decline but actually achieving growth, albeit at a slower rate than the tourism industry generally
- There are significant and multiple opportunities for further and continued growth, if coastal communities are given access to the right support and funding
- The visitor economy on the coast needs public sector support and collaboration to achieve its potential. Unlike urban areas, the high concentration of SMEs and lack of research historically, mean that coordination of change can be slow – as evidenced in the delay to maximise the short break trend. In addition, the high dependence on public space (e.g. beach, piers, and parks) as the key attractors, means there needs to be a strong partnership between private and public sector, as well as clear leadership
- Many small businesses operate with small profit margins and therefore cannot be relied upon to solely support the destination management structures needed in coastal communities. With pressures on funding continuing, the visitor economy on the coast is under threat and not as prepared as other types of tourism experiences in the UK to compete on a global scale
- Critically, the coast has an awareness issue – it's not that visitors don't want to go to the coast, it is simply that they don't know enough about what is on offer, whether destinations are 'open' year round or how to get there. Potential visitors' exposure to positive messages about the coast, are outweighed by general perceptions that tend to be more negative as well as being drowned out by messages from other types of experience

Recommendations

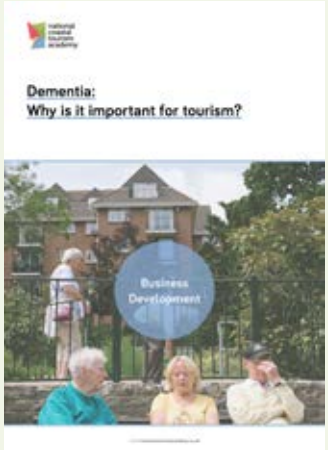
Growth in the global visitor economy is phenomenal, and for coastal communities it could present a long-term solution to sustainable growth and prosperity. Coastal communities now have access to much more information about current and potential visitors than at any time in the past, as well as advice and support on best practice and how to deliver change.

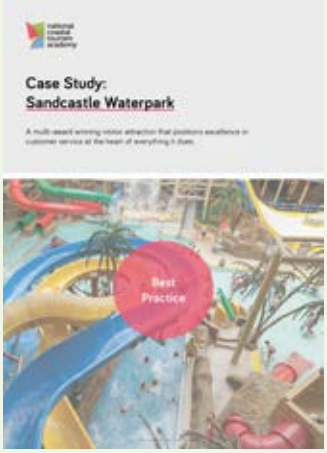
To achieve their growth potential, coastal communities need:

- Continued investment in research and development, best practice and advice on ways to achieve growth
- Business support and training for SMEs and independent tourism businesses to deliver change
- Support to create collaborative partnerships within and between destinations, undertake a detailed product-market fit exercise and develop a clear vision for each destination
- On-going commitment to investment in the coast to bring growth in line with national averages, supported by a more coordinated approach to funding of coastal development
- Increased support to raise awareness and change the perceptions of non-visitors, the media and government to reduce the gap between the perceptions and reality of the coastal tourism offer and its importance to the UK economy

Our coast is a beautiful and valuable asset that can be used to achieve growth but needs managing in a coordinated, strategic, holistic and sustainable way.

Visit our Resource Hub





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