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National overview and introduction to Year of the Coast 2023

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NCTA Director
November 2022

Overnight Domestic Travel - Summer 2022

The UK public took fewer overnight domestic trips in Summer 2022 than in Summer 2021. The drop was driven by...

A switch to overseas travel in 2022

The 'displacement effect' of a 'squeezed holiday window' in 2021

Financial concerns due to the 'cost-of-living crisis' in 2022

Extreme weather conditions in 2022

Whilst day trips were also likely driven down by financial pressures, increased comfort with 'everyday activities' means more day trips were taken to indoor venues in Summer 2022 than in Summer 2021.

The balance of domestic versus overseas travel is closer to pre-pandemic levels, but financial pressures mean domestic trips are still likely to be favoured as we head into 2023.

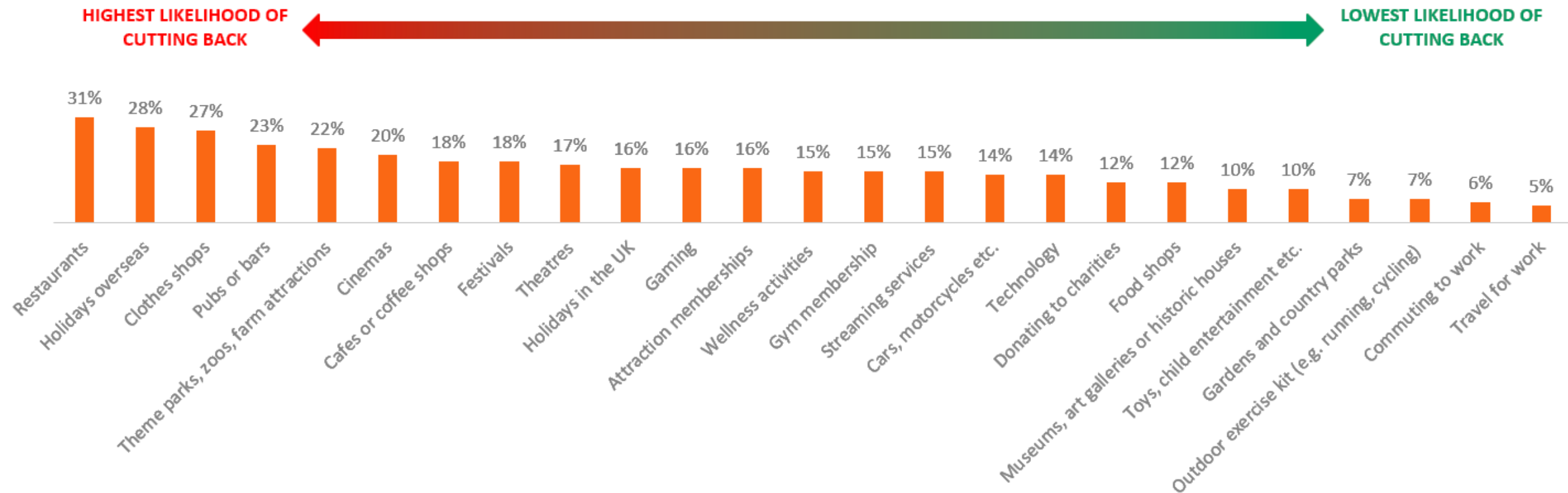
Opportunities for 2023 and beyond

<p>Unique, unmissable experiences are more important than ever</p>	<p>The wellness trend continues to gain momentum</p>
<p>Premium experiences may balance the books</p>	<p>Empty-nesters will have the most time and money</p>

An overall trend of 'cutting back' means competition will be fierce

Unique, unmissable experiences are more important than ever

Activities most likely to 'cut back on' in next 6 months (% of all who do each activity)



17 The cost-of-living crisis means some people are likely to have less disposable income in the coming months. In the context of the cost-of-living crisis, if you had to cut your disposable spending on any 5 of these, which would you choose? Base n=1,750

Opportunities for 2023 and beyond

Google trends data shows a consistent rise in searches for wellness

The hierarchy of cut backs shows people are still prioritising mental and physical health

27% of the UK population say they won't be affected or are better off as a result of the cost of living crisis

Inbound market is a key opportunity

The US market is nearing pre-pandemic levels and favour premium experiences

The wellness trend continues to gain momentum

Premium experiences may balance the books

Opportunities for 2023 and beyond



Empty-nesters will have
the most
time and money

Empty-nesters make up a third of the population and have more time and disposable income

More likely to travel off-peak, living well for longer, like UK breaks

Most insulated from the cost of living crisis – only 8% worse off



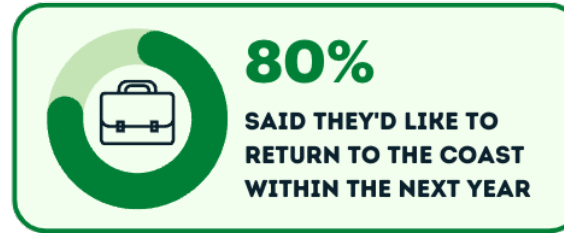
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England's Coast Consumer survey

November 2022

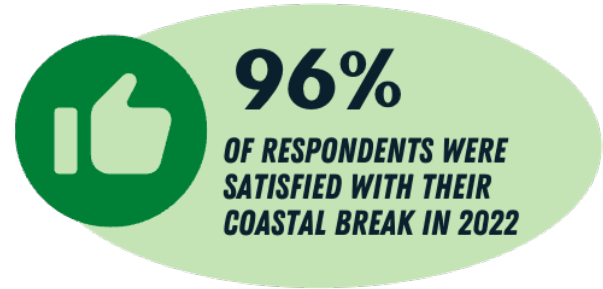
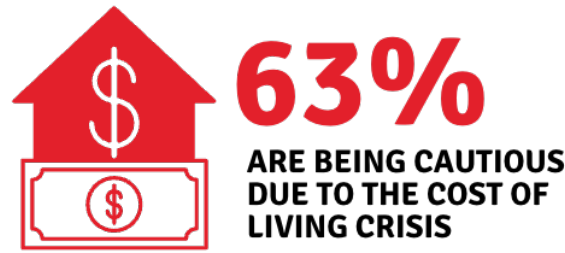
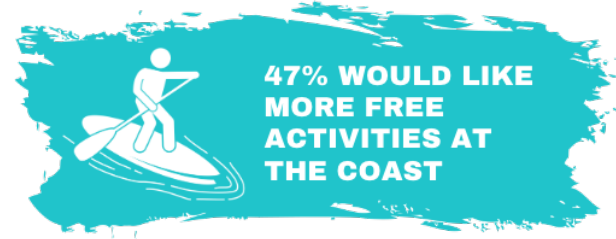
Key findings

This consumer survey was conducted between October and November 2022 to measure satisfaction from visits during 2022 and to gauge travel habits on England's Coast.



WHY VISIT THE COAST?

THE MAIN MOTIVATION FOR A VISIT TO THE COAST WERE, RELAXATION, QUALITY TIME WITH FRIENDS OR FAMILY, AND TO SIGHTSEE OR EXPLORE



About their visit

Who they travelled with and motivations

Who was with you on this holiday?

72% of visits were undertaken with a partner/spouse
16% with children (under the age of 18) & 13% with children (18+)
15% with friends
7% with parents or grandparents
8% not travelling with anyone else

10% of travellers had dogs with them on their visit

The main motivation for visits were:

- 1) Relaxation 51%
- 2) Quality time with friends or family 39%
- 3) To sightsee or explore 36%

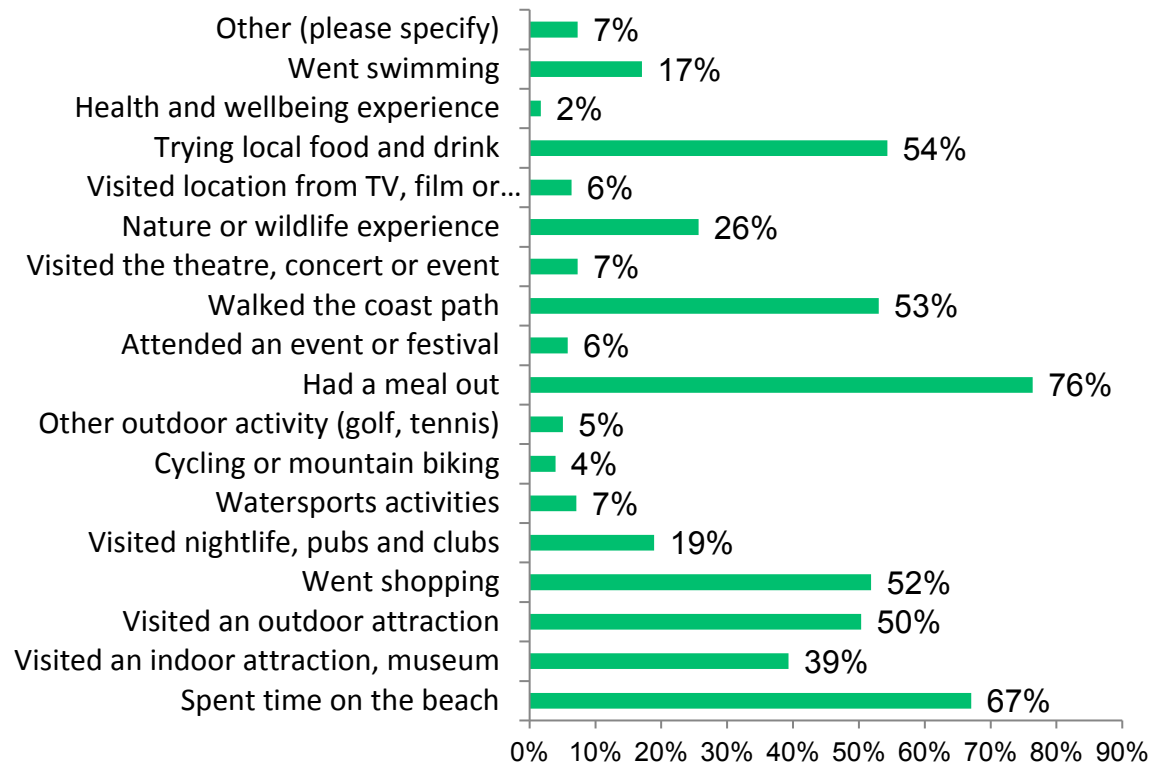
Of note, 24% just booked a break and didn't mind which location they visited



Activities undertaken and Satisfaction

About their visit

What type of activities did you (and your group) undertake during your holiday?



96% were satisfied with their visit

88% thought it was good or excellent value for money

58% said it was better than their expectation only 3.9% said it was worse than their expectations



Future considerations

What new products or experiences would you like to see available on a coastal holiday?

Almost two thirds of visitors would like to see more places open in the winter months (62%), half of visitors would like more locally sourced food and drink (53%).

47% would like more free activities

A quarter of respondents would like more dog-friendly places, events, accessible and sustainable experiences.

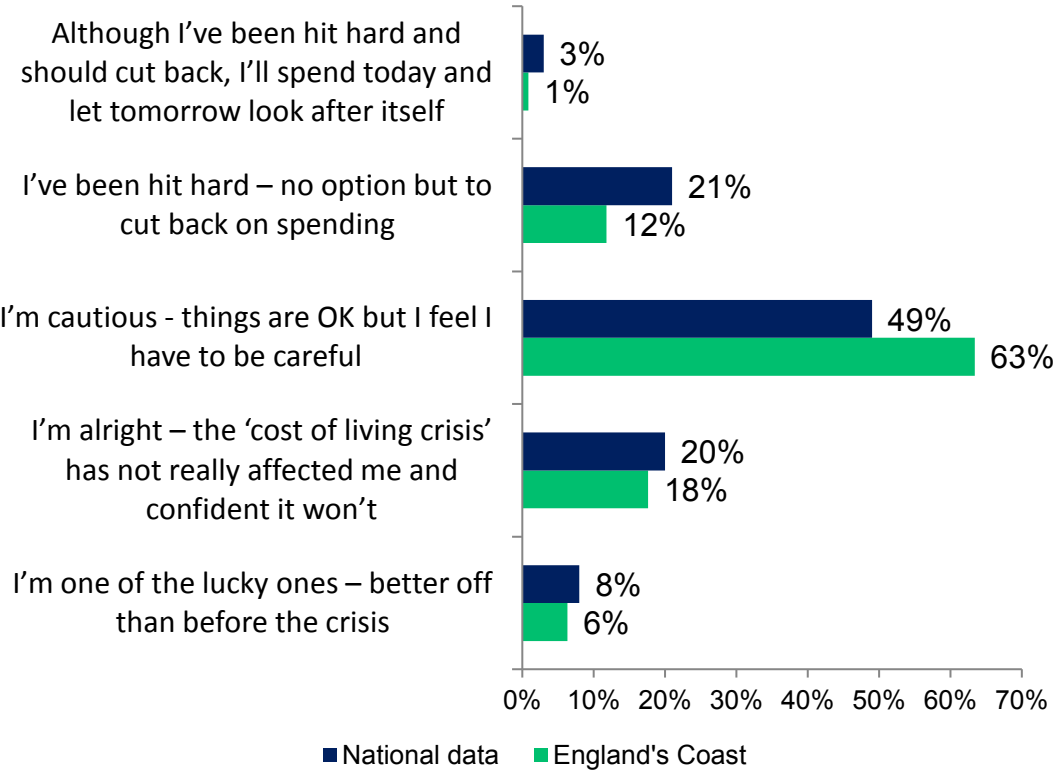
89% of visitors would consider a break to the coast in the winter months (between November and April)



Cost of living situation

Impact

Which ONE of the following would best describe your situation concerning the 'cost of living crisis'?



The majority of respondents (63%) said that they are being cautious “things are OK but I feel I have to be careful”

The England’s Coast respondents that have been hard hit by the economic situation is significantly lower than the national sample*.

When considering how respondents might change their holiday choices as a result of the cost of living situation the top answers were **“Spend less eating out”** and **“Look for more free things to do” (34%)** - these both also feature in the top 3 responses on the VisitEngland survey.

Almost a quarter will not change their holiday choices (24%)

29% are more likely to holiday in the UK

Only 7% say they won't take a holiday



* National data taken from VisitEngland Domestic Sentiment Tracker – November 2022 wave Available to download [here](#)

Sustainability

Importance and considerations for future visits

78% say reducing their carbon footprint or making more sustainable choices on holiday was very (27%) or somewhat (51%) important – this is a drop from last year where 86% said it was very or somewhat important

55% were willing to take more UK breaks

57% were willing to use public transport, walk or cycle once they've arrived in the destination (this is an increase of 20pts on last year's survey)

Two-thirds (66%) of respondents say they would not pay more for a holiday that is more sustainable but would prefer a more sustainable holiday at the same cost



Bookings and plans for 2023

Current plans and key factors influencing choice

What are your current plans or preferences for holidays in 2023?

44% want to take a holiday abroad in 2023

77% will consider a UK Coastal holiday in 2023

42% will take a day trip to the coast

Price remains the top factor influencing consumer choice in 2023 (68%).

32% have already booked their main holiday for 2023

UK domestic breaks remain a popular option, but consumers are considering European and global locations as well





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How's business?

Coastal Tourism Business Survey
2022 Wave 3 results

Survey live between 20 September – 16 October 2022

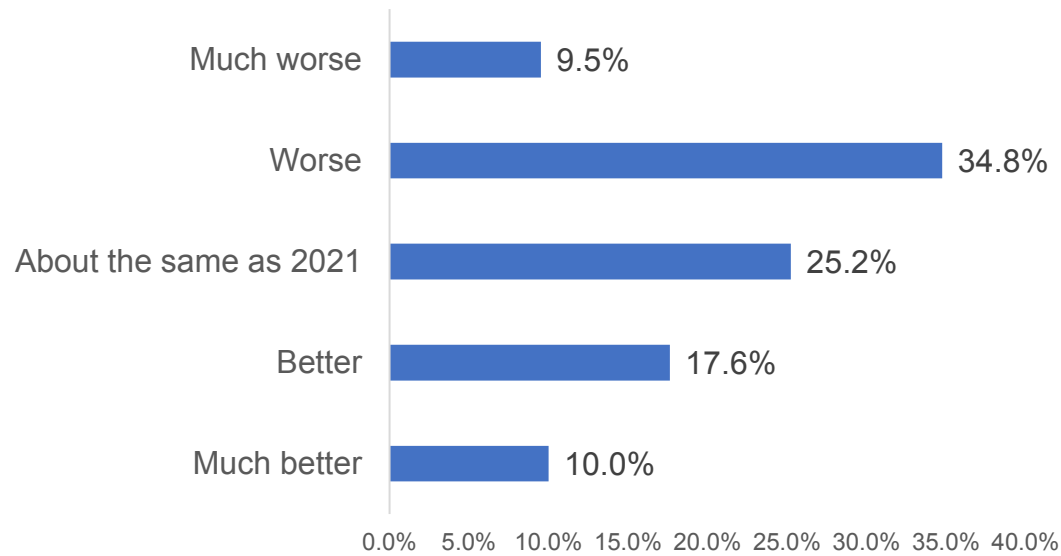
NCTA Business Survey – 2022 wave 3

Business Performance

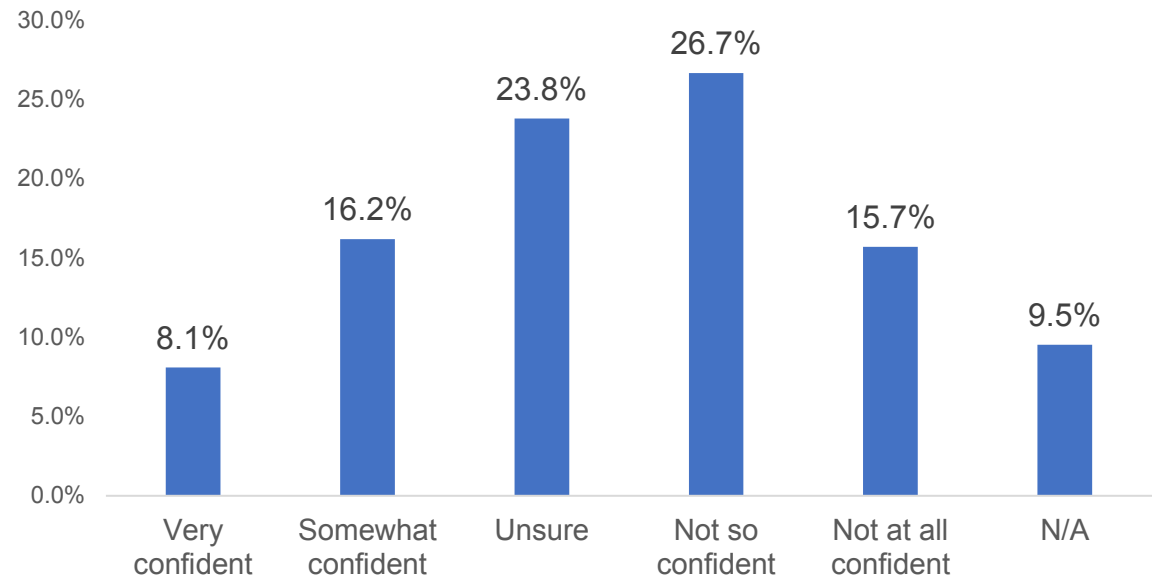
67% of businesses are back to profitability (up from 46% in previous wave).
19% estimate it will be more than 12 months before they are profitable

Majority are not confident about the next 6 months of trading. Offset by 24.3% who are very or somewhat confident.

How does Summer (Jun-Aug) 2022 compare to last year (2021)?



Confidence about next 6 months of trading (to end March 23)



NCTA Business Survey

2022 Wave 3 – Autumn (survey was live between September – October 2022)

59% agree “Consumer spend overall is lower than previous year”

72% say “Demand is very unpredictable (busy one day, quiet the next with no real pattern)”

Top 5 responses - **Which of the following external factors, if any, are affecting your business?**

1.	Poor UK economic climate / less money in consumer's pockets	85.7%
2.	Increasing energy and fuel costs	71.0%
3.	Increasing supplier costs	53.3%
4.	Seasonality of the destination	47.6%
5.	Increased staffing costs	31.9%

42% of businesses are either closing for Winter or certain days of the week to reduce costs

30% are delaying investment and maintenance works

48% are increasing prices to consumers

NCTA Business Survey

2022 Wave 3 – Autumn (survey was live between September – October 2022)

A number of businesses have seen an increase in European and other international visitors this summer, but business and conference visitors remain low

Almost all businesses say reducing costs is very or somewhat important to them at the present time (97%)

Positively, 82% of businesses are still focused on improving sustainability

Increasing year-round business, improving skills and accessibility are also important to the majority of businesses



YEAR OF THE Coast 2023

Campaign outline

YEAR OF THE
Coast
2023

#coast2023

WHY IS 2023 THE YEAR OF THE COAST?



The UK coastline ranks as one of the most exciting in the world; more than 185 million years old, and one of the most varied – rich in maritime port cities, smuggling villages, family resorts, natural beauty and unique sea life.

Year of the Coast 2023 marks:

- The heralding of the England Coast Path; on completion it will be the longest marked walking route in the world
- An opportunity for coastal communities to collaborate and visitors to explore new coastal destinations
- An opportunity to have a wider conversation, engage new audiences and raise the profile of the coast
- A season to present sustainable coastal experiences, celebratory events, and new products
- The chance to introduce a new generation to the nature, culture and heritage on the coast to ensure its sustainable future

Coast
2023

What will be happening?



Tourism Initiative runs throughout the year

- Amplify and coordinate a year-long programme of events
- Walking and cycling routes and sustainable experiences promoted
- Volunteering will be a particular focus e.g. beach clean-ups
- New content e.g. local stories, travel blogs and features
- 2023 is also the Year of the Pier, the 50th Anniversary of the South West Coast Path and will see the completion of large sections of the new England Coast Path National Trail.

Social, Environmental, Economic, Academic and Political opportunities

- APPG for Coastal Communities is hosting a series of themed roundtable
- OneCoast research – Levelling Up on the Coast
- New Coastal Visitor Economy strategy
- Seaside Heritage Network re-launching with programme of events

YEAR OF THE COAST IS AN INITIATIVE FOR EVERYONE SO PLEASE GET INVOLVED

Coast
2023

How do I get involved?

January-February	Health and wellbeing
March-April	Nature – wildlife
May-June	Local food and drink
May-June	Active and Watersports
July-August	Family fun
July-August	Seaside heritage
September	Seafood / local food and drink
September-October	Arts & culture & entertainment
October	Nature & dark skies
November-December	Christmas

Download the toolkit: [2023 Year of the Coast - toolkit](#)

Toolkit includes ideas of how you can get involved e.g.:

- Events, celebrations and anniversaries
- Engagement or taster sessions
- New experiences, products or openings

Send us content for our themes (see chart) alongside our year-long themes:

- Walking - focus on coast path sections as they open during the year
- Events
- Accessibility
- Sustainability
- Community

Upload your events to www.thesuffolkcoast.co.uk which will feed into www.yearofthecoast.com content

Three things...

1. Download the Year of the Coast toolkit – start thinking how you can get involved, add your events to www.thesuffolkcoast.co.uk and send us your content
2. Key opportunities for 2023 – free activities, year-round experiences, locally sourced food and drink, wellness, unique and unmissable experiences, make it easy for consumers to think sustainability
3. Stay in touch – with The Suffolk Coast team and England's Coast team



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For more information about the National Coastal Tourism Academy and latest research visit: www.coastaltourismacademy.co.uk

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Download the [Year of the Coast 2023 toolkit](#) and [share your activity with us](#)