England’s Seaside: What are the opportunities?
Introduction

This report seeks to assist seaside and coastal tourism businesses and destinations to identify and exploit opportunities to grow their businesses and markets.

It consolidates insights from the extensive range of primary research that VisitEngland conducts into a single report, designed explicitly for organisations with a seaside tourism focus. The principal sources of VisitEngland research drawn upon within the report include:

- Great Britain Tourism Survey (GBTS)
- Day Visits Survey
- Annual Visitor Attractions Survey
- Tourism Business Monitor
- England Occupancy Survey
- Staycation Research
- Destination Brand, Communications and Satisfaction Tracker
- Digital Landscape Research
## Volume and Value of Seaside Tourism 2012

<table>
<thead>
<tr>
<th></th>
<th>Domestic Overnight (all trips)</th>
<th>Domestic Overnight (holiday trips)</th>
<th>Tourism Day Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% of all trips</td>
<td>% of all trips</td>
<td>% of all trips</td>
</tr>
<tr>
<td>Trips (millions)</td>
<td>20</td>
<td>19</td>
<td>14</td>
</tr>
<tr>
<td>Nights (millions)</td>
<td>79</td>
<td>25</td>
<td>62</td>
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<tr>
<td>Spend (£ millions)</td>
<td>4,313</td>
<td>22</td>
<td>3,540</td>
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</table>

Source: GB Tourism Survey and GB Day Visits Survey
Seaside: What makes it different from other holiday destinations?
Summary: What makes seaside different from other holiday destinations? / 1

**Overnight Domestic Trips**

Trips to the seaside made up 31% (14.4 million) of the 46.0 million overnight domestic trips taken for holiday purposes in 2012.

Almost half of overnight stays at seaside destinations take place in the summer (Jul-Sep), although there is still a notable volume of off-peak trips.

The South West accounts for 40% of all domestic seaside trips which involve an overnight stay.

44% of all domestic seaside trips which involve an overnight stay include camping / caravanning sites or a holiday camp.

Seaside trips including overnight stays are more likely than other trips to:

• Include children *(47% versus 34% on trips overall)*
• Be made by those from lower social grades *(42% made by C2DEs versus 34% for trips overall)*
• Involve longer stays *(62% are stays of 4+ nights versus 44% for trips overall)*

For any given destination region, at least a quarter of overnight holiday visitors come from within that same region. This figure rises to over half in Yorkshire & Humberside (57%) and two in five in the North West (41%).
Summary: What makes seaside different from other holiday destinations? / 2

Tourism Day Trips

Many of the differences for overnight stays at the seaside are also reflected in day trips:
- Seaside day trips are more likely to involve children (24% versus 16% for all trips)
- Lower social grades are strongly represented (47% are C2DEs versus 41% on all trips)
- Time spent at the destination is also longer (33% spend 6+ hours versus 26% for all trips)
- People travel further to seaside destinations (29% travel 60+ miles versus 19% on all trips)

Half of all tourism day trips to the seaside are to destinations in the South East and South West. Only 28% of all tourism day trips are to these two regions

The seaside is more likely to be seen as a ‘general day out’ destination for a tourism day trip than other destination types. Other tourism day trips are more likely to be to see friends/family or to take part in a specific activity

Every region sees at least half of its tourism day trippers coming from within that same region, with this increasing to four in five (82%) in the North West.
Trips to the seaside made up 31% of the 46.0m overnight domestic holiday trips taken in 2012.

Almost half of overnight stays at seaside destinations take place in summer (Jul-Sep), although there are still notable off-peak trips.

The South West accounts for 40% of all domestic holiday seaside trips which involve an overnight stay.

44% of all domestic seaside holidays which involve an overnight stay include camping / caravanning sites.

<table>
<thead>
<tr>
<th>Region</th>
<th>Holiday camp / camping / caravanning</th>
<th>Hotel / motel</th>
<th>Other serviced accommodation</th>
<th>Self-catering</th>
<th>Friends / relatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>SW</td>
<td>24</td>
<td>40</td>
<td>14</td>
<td>10</td>
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</tr>
<tr>
<td>SE</td>
<td>16</td>
<td>27</td>
<td>11</td>
<td>14</td>
<td>3</td>
</tr>
<tr>
<td>Y&amp;H</td>
<td>11</td>
<td>26</td>
<td>13</td>
<td>9</td>
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</tr>
<tr>
<td>East</td>
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<td>16</td>
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<tr>
<td>NW</td>
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<td>14</td>
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<td>3</td>
<td>4</td>
</tr>
<tr>
<td>East Mids</td>
<td>8</td>
<td>14</td>
<td>8</td>
<td>8</td>
<td>8</td>
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<tr>
<td>NE</td>
<td>3</td>
<td>14</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>London</td>
<td>9</td>
<td>12</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>West Mids</td>
<td>6</td>
<td>12</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: GB Tourism Survey
Seaside holidays including overnight stays are more likely than other trips to include children.

- **Seaside trips**: 47% with children, 53% no children
- **All trips**: 34% with children, 66% no children

The length of stay at destinations tends to be longer for seaside trips than trips to other destinations.

- **Number of nights away**:
  - 1-2 nights: 7% seaside, 18% all trips
  - 2-3 nights: 27% seaside, 35% all trips
  - 4-7 nights: 32% seaside, 26% all trips
  - 8+ nights: 30% seaside, 17% all trips

Seaside trips are also more likely than other trips to be made by those from lower social grades.

- **Social grades**:
  - AB: 29% seaside, 36% all trips
  - C1: 29% seaside, 30% all trips
  - C2: 19% seaside, 20% all trips
  - DE: 15% seaside, 20% all trips

Seaside trips including overnight stays are predominantly made by car.

- **Mode of transport**:
  - Car: 82% seaside, 78% all trips
  - Train: 6% seaside, 12% all trips
  - Organised coach: 5% seaside, 3% all trips
  - Other: 6% seaside, 7% all trips

Source: GB Tourism Survey
...and much of this is also reflected on TOURISM DAY TRIPS

Day trips to the seaside are more likely than other trips to take place with children

<table>
<thead>
<tr>
<th></th>
<th>Seaside trips</th>
<th>All trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>With children</td>
<td>24</td>
<td>16</td>
</tr>
<tr>
<td>No children</td>
<td>76</td>
<td>84</td>
</tr>
</tbody>
</table>

Lower social grades are also over-represented on day trips to the seaside

<table>
<thead>
<tr>
<th>Social Grade</th>
<th>Seaside trips</th>
<th>All trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>23</td>
<td>29</td>
</tr>
<tr>
<td>C1</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>C2</td>
<td>22</td>
<td>21</td>
</tr>
<tr>
<td>DE</td>
<td>20</td>
<td>25</td>
</tr>
</tbody>
</table>

Time spent at the destination is likely to be longer on seaside day trips than day trips elsewhere

<table>
<thead>
<tr>
<th>Time Spent</th>
<th>Seaside trips</th>
<th>All trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>3-4 hours</td>
<td>33</td>
<td>38</td>
</tr>
<tr>
<td>4-5 hours</td>
<td>21</td>
<td>24</td>
</tr>
<tr>
<td>5-6 hours</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>6+ hours</td>
<td>26</td>
<td>33</td>
</tr>
</tbody>
</table>

The distance travelled on a day trip to the seaside destination is likely to be further than for other destinations

<table>
<thead>
<tr>
<th>Distance</th>
<th>Seaside trips</th>
<th>All trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 20 miles</td>
<td>38</td>
<td>50</td>
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<tr>
<td>21-60 miles</td>
<td>22</td>
<td>21</td>
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<tr>
<td>Over 60 miles</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Don't know</td>
<td>11</td>
<td>10</td>
</tr>
</tbody>
</table>

Source: GB Day Visits Survey
The seaside is more likely to be seen as a ‘general day out’ destination for a tourism day trip than other destination types

### Main activity

- **General day out / explore**: Seaside trips 27%, All trips 6%
- **Visit friends / family**: Seaside trips 24%, All trips 13%
- **Outdoor leisure activity e.g. walking, cycling, golf**: Seaside trips 12%, All trips 7%
- **Went for a meal**: Seaside trips 10%, All trips 8%
- **Night out**: Seaside trips 9%, All trips 6%
- **Live sporting event**: Seaside trips 8%, All trips 4%
- **Visitor attraction**: Seaside trips 6%, All trips 5%
- **Shopping**: Seaside trips 8%, All trips 3%
- **Entertainment**: Seaside trips 6%, All trips 3%
- **Special public event**: Seaside trips 3%, All trips 3%

Source: GB Day Visits Survey
### As a seaside destination, where do my overnight visitors come from?

<table>
<thead>
<tr>
<th>Region visited</th>
<th>NE</th>
<th>NW</th>
<th>Y&amp;H</th>
<th>East Mids</th>
<th>East</th>
<th>SE</th>
<th>SW</th>
</tr>
</thead>
<tbody>
<tr>
<td>NE</td>
<td>36</td>
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<td>11</td>
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<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>NW</td>
<td>7</td>
<td>41</td>
<td>9</td>
<td>3</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Y&amp;H</td>
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<td>19</td>
<td>57</td>
<td>36</td>
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<td>3</td>
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<tr>
<td>West Mids</td>
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<td>1</td>
<td>3</td>
<td>28</td>
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</table>

Source: GB Tourism Survey

### As a seaside destination, where do my day trip visitors come from?

<table>
<thead>
<tr>
<th>Region visited</th>
<th>NE</th>
<th>NW</th>
<th>Y&amp;H</th>
<th>East</th>
<th>SE</th>
<th>SW</th>
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</thead>
<tbody>
<tr>
<td>NE</td>
<td>63</td>
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<tr>
<td>Y&amp;H</td>
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</tr>
<tr>
<td>SW</td>
<td>-</td>
<td>1</td>
<td>4</td>
<td>-</td>
<td>3</td>
<td>60</td>
</tr>
</tbody>
</table>

Source: GB Day Visits Survey
What are the main overnight seaside destinations?

<table>
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<tr>
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</thead>
<tbody>
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<td>1.40m</td>
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<td>1.53m</td>
<td>1.63m</td>
<td>1.62m</td>
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<tr>
<td>Blackpool</td>
<td>1.65m</td>
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<td>1.50m</td>
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<td>1.48m</td>
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<tr>
<td>Isle of Wight</td>
<td>1.00m</td>
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<td>1.05m</td>
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<tr>
<td>Skegness</td>
<td>0.87m</td>
<td>0.88m</td>
<td>0.95m</td>
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<td>1.03m</td>
</tr>
<tr>
<td>Brighton</td>
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<td>1.10m</td>
<td>1.08m</td>
<td>1.10m</td>
<td>1.02m</td>
</tr>
<tr>
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<td>0.93m</td>
<td>0.97m</td>
<td>0.96m</td>
</tr>
<tr>
<td>Great Yarmouth</td>
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<td>0.72m</td>
<td>0.70m</td>
<td>0.72m</td>
<td>0.68m</td>
</tr>
<tr>
<td>Portsmouth</td>
<td>0.62m</td>
<td>0.64m</td>
<td>0.59m</td>
<td>0.61m</td>
<td>0.67m</td>
</tr>
<tr>
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<td>0.54m</td>
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<td>0.63m</td>
</tr>
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<td>0.64m</td>
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<td>0.57m</td>
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<tr>
<td>Weymouth</td>
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<td>0.55m</td>
<td>0.54m</td>
<td>0.57m</td>
<td>0.52m</td>
</tr>
</tbody>
</table>

Source: GB Tourism Survey
Seaside: what are the emerging trends in overnight holiday trips?
Summary: What are the emerging trends in overnight holiday trips?

After increasing by a quarter in 2009, the volume of holiday trips to the seaside has fallen back to pre-recession levels. This runs contrary to the volume of trips overall, which has remained strong since its initial uplift in 2009.

Online booking of seaside trips is rising in line with trips overall: 42% of trips were booked online in 2012 compared with 20% in 2006. However, seaside destinations are still a little behind the curve, with 47% of all trips booked online in 2012.

Although seaside trips are more likely than other trips to be made by lower social grades, their representation on seaside holidays is in decline (as is their representation within the overnight domestic holiday market overall).

Overnight seaside trips not only tend to be longer in duration than other trips, but have also remained longer when the market overall has shortened trip lengths slightly. The proportion of seaside holidays lasting 4+ nights has remained at around two-thirds since 2006, whereas the proportion of all holidays of this length has declined from 47% to 43%.
Overnight trips to the seaside have fallen back to pre-recession levels, unlike holiday trips overall.

Online booking of seaside trips is rising in line with trips overall, although seaside trips are still slightly behind the online booking curve.

Source: GB Tourism Survey
Overnight seaside trips are more likely than other trips to be made by lower social grades. However, the representation of lower social grades on seaside holidays is in decline, in line with the holiday market overall.
Overnight seaside trips not only tend to be longer in duration than other trips, but have also remained longer when the market overall has shortened trip lengths slightly.

Source: GB Tourism Survey
What are the attitudes of the public and businesses?
Summary: What are the attitudes of the public and businesses?

The public tend to divide seaside / coastal destinations into three themes:

- **Traditional Seaside Resorts / Towns:** tend to be much maligned
- **English Coastline:** appealing imagery, but actual destinations and activities less clear
- **Seaside Towns and Nearby Coast:** seen as a great base from which to explore

Public perceptions of the seaside vary by lifestage:

- **Pre-Family:** poor awareness of destinations beyond South West
- **Family:** open to less traditional seaside towns which provide things to do
- **Empty Nesters:** want remote rural escape and a base to explore from

Seaside seen by the public as low cost destination. More likely than other destinations to be seen as good value, having deals / discounts and not expensive to get to. The seaside also better rated for its availability of individual / independent local shops

A visit to the seaside is now seen by the public as so much more than just the beach: 38% see it as a conduit to relax, 38% sightsee on foot and 30% go for a short walk

Businesses feel that they can attract visitors by investing in their product:

- Over half of seaside accommodation businesses intend to invest in facilities / fittings in 2013 and 22% will invest in marketing
- But seaside attractions remain behind others in terms of offering public events and venue hire

Within seaside visitor attractions, there is a trend away from employing full time permanent employees and towards employing volunteers.

Seaside businesses are becoming increasingly savvy in the digital age, although there is still more progress to be made. For example, 34% of attractions and 56% of accommodation businesses now accept online bookings.
The public tend to divide coastal destinations into three themes

**Traditional English Resort / town**

“Much maligned”
- Piers, arcades etc.
- Blackpool, Skegness

Typical perceptions negative:
- Tacky, dated, faded and dirty (but cheap)
- More ironic destination

Although minority love:
- Recapturing childhood memories (especially families)
- Some diversifying (e.g. Brighton)

Need to discover an alternative side to complement traditional image

**English Coastline**

“Appealing images”
- Scenic, long stretches
- Cornwall, Northumberland

Positives seen as:
- Cliffs, long stretches of beach / coast
- Slower pace of life (esp. empty nesters)
- Get away from it all (esp. families)
- Associated with local produce and seafood

Actual destinations and activities unclear beyond familiar (especially among pre-family)
- Devon & Cornwall, Northumberland dominate
- Little beyond these

**Seaside Towns and Nearby Coast**

“Great base to explore”
- Quaint, distinctive
- Filey, Salcombe

They create sense of more to do there
- Different walks, things / places to explore, eat, visit (especially empty nesters)
- Local history and places of interest in addition to coast

Again, specific destinations unclear
- Especially far away from home

Opportunity to promote coastline within 2-3 hours
- Especially families, who want things to do without tackiness
Satisfaction with the seaside generally better than other destinations, but particularly in terms of being seen as a low cost destination

<table>
<thead>
<tr>
<th></th>
<th>% rating excellent / good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value for money</td>
<td>66</td>
</tr>
<tr>
<td>Availability of deals / discounts</td>
<td>58</td>
</tr>
<tr>
<td>Not too expensive to get to</td>
<td>60</td>
</tr>
</tbody>
</table>

...% rating excellent / good

...and better rated for availability of individual / independent local shops (56% vs. 51% for destinations overall)

Lowest ratings for seaside destinations compared with other types of destination mainly relate to quality and ease of access

<table>
<thead>
<tr>
<th></th>
<th>% rating excellent / good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of accommodation</td>
<td>68</td>
</tr>
<tr>
<td>Quality of food / drink and dining</td>
<td>64</td>
</tr>
<tr>
<td>Ease to get to by public transport</td>
<td>41</td>
</tr>
<tr>
<td>Doesn’t take too long to get to</td>
<td>58</td>
</tr>
<tr>
<td>Availability of festivals and cultural events</td>
<td>38</td>
</tr>
</tbody>
</table>

...although seaside destinations still no worse than elsewhere

Activities on overnight holiday stays at seaside destinations

<table>
<thead>
<tr>
<th>Activity</th>
<th>Millions of Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Just relax</td>
<td>5.4m</td>
</tr>
<tr>
<td>Beach</td>
<td>5.3m</td>
</tr>
<tr>
<td>Sightseeing on foot</td>
<td>5.4m</td>
</tr>
<tr>
<td>Short walk</td>
<td>4.3m</td>
</tr>
<tr>
<td>Sightseeing by car</td>
<td>3.4m</td>
</tr>
<tr>
<td>Long walk</td>
<td>2.9m</td>
</tr>
</tbody>
</table>

Activities on tourism day trips to seaside destinations (millions of trips)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Millions of Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go for meal</td>
<td>42m</td>
</tr>
<tr>
<td>Visit beach</td>
<td>31m</td>
</tr>
<tr>
<td>Short walk</td>
<td>27m</td>
</tr>
<tr>
<td>Go for drink</td>
<td>23m</td>
</tr>
<tr>
<td>Just relax</td>
<td>22m</td>
</tr>
<tr>
<td>Long walk</td>
<td>20m</td>
</tr>
<tr>
<td>Sightseeing on foot</td>
<td>19m</td>
</tr>
</tbody>
</table>

Source: VE Brand, Communications and Satisfaction Tracker

Source: GB Tourism Survey / GB Day Visits Survey

A visit to the seaside is now seen by the public as so much more than just the beach

Source: GB Tourism Survey / GB Day Visits Survey
Businesses feel that they can attract visitors to the seaside by investing in their product.

Seaside accommodation businesses intending to increase investment in 2013 (%)

<table>
<thead>
<tr>
<th>Services</th>
<th>Seaside attractions</th>
<th>All attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities / fittings</td>
<td>53</td>
<td>40</td>
</tr>
<tr>
<td>Marketing</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>Discounts and deals</td>
<td>19</td>
<td>17</td>
</tr>
<tr>
<td>Staff training</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Source: Tourism Business Monitor

Seaside visitor attractions offering…. (2012 %)

<table>
<thead>
<tr>
<th>Services</th>
<th>Seaside attractions</th>
<th>All attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>76</td>
<td>79</td>
</tr>
<tr>
<td>Retail shop</td>
<td>67</td>
<td>68</td>
</tr>
<tr>
<td>Public events</td>
<td>53</td>
<td>57</td>
</tr>
<tr>
<td>Member scheme</td>
<td>58</td>
<td>56</td>
</tr>
<tr>
<td>Café / restaurant</td>
<td>45</td>
<td>51</td>
</tr>
<tr>
<td>Venue hire</td>
<td>35</td>
<td>38</td>
</tr>
<tr>
<td>Corporate events</td>
<td>20</td>
<td>25</td>
</tr>
</tbody>
</table>

Seaside attractions are less likely than other attractions to offer catering or corporate events.

Source: Survey of Visits to Visitor Attractions

Should businesses be investing in staff more?

Seaside visitor attraction change in employees (2011-2012)

<table>
<thead>
<tr>
<th>Services</th>
<th>% down</th>
<th>% up</th>
</tr>
</thead>
<tbody>
<tr>
<td>FT permanent</td>
<td>12</td>
<td>6</td>
</tr>
<tr>
<td>FT seasonal</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>PT permanent</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>PT seasonal</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Unpaid volunteers</td>
<td>23</td>
<td>25</td>
</tr>
</tbody>
</table>

As unpaid volunteers replace full-time staff, we must remember to train and motivate these volunteers.

Source: Survey of Visits to Visitor Attractions

Case Study: Heath Lodge

11-20% increase in visitors during 2012YTD compared with the same period in 2011

We’ve had a great year and are fairly booked up until the end of December. We can rely on our repeat visitors - around a third of our guests have visited before - and other domestic visitors are up as well.

I think the secret to our success is just that we try to give a little bit back to our guests. I want people to go away thinking they’ve been on their best ever holiday.

We have improved the facilities this year and provide a lot for our guests to do: I leave them information about nice places to visit, provide games, and have just set up croquet course.

I also give my customers loads of quality scones and cakes that I cook myself, and wine as well, to keep them happy!

We stay open all year, which definitely helps business. We’re a seaside resort, we make the house cozy in winter with Christmas decorations and presents for guests, which helps business.

Finally, to keep new business coming in, I do a lot of advertising.
Seaside attractions businesses are becoming increasingly savvy in the digital age

Seaside Visitor Attractions (2012)
- 53% are on Facebook
- 41% are on Twitter
- 22% have e-newsletters
- 17% operate online blogs
- 10% have a mobile-optimised website
- 8% have mobile apps

All Visitor Attractions (2012)
- 55% are on Facebook
- 45% are on Twitter
- 29% have e-newsletters
- 16% operate online blogs
- 10% have a mobile-optimised website
- 7% have mobile apps

Source: Visits to visitor attractions survey
What are the trends affecting us all?
Summary: What are the trends affecting us all?

Staycations look set to stay for the foreseeable future, with Empty Nesters leading trip growth

The 2012 Olympics, Paralympics and Diamond Jubilee events have further strengthened the appetite for holidaying in the UK

Day trips from home remain an important opportunity with the notable recent decline in holiday trips abroad and an increasing societal shift towards ‘all things local’.

The economy continues to impact upon us all, and as a result free attractions are proving popular. However, there are some signs of improved consumer confidence and indications of an increasing willingness of banks to lend

Overall, charging attractions saw a drop in visitor numbers in 2012, but were able to maintain revenue through price increases

There is strong evidence that businesses with the ability and confidence to invest in these tough times are reaping rewards

Exploiting the digital revolution is key to the success of tourism businesses:
• Provision of online booking facilities is rising rapidly
• Seeking information via mobile devices is now the norm, both at home and ‘on the hoof’
• Google is very often the first port of call

There are some societal shifts taking place in the background:
• An ageing population, but which is staying active longer
• Emerging traveller parties: extended families and singles travel
• Generation Y travellers who expect personal, tailored experience and who book late
Staycations look set to stay for the foreseeable future

Overnight stays in England remain at the high levels observed in 2009...

<table>
<thead>
<tr>
<th>Older age groups lead growth in trips</th>
<th>Average annual % change 2007-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL HOLIDAYS</td>
<td>+2.6%</td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>+2.1%</td>
</tr>
<tr>
<td>Families</td>
<td>+2.4%</td>
</tr>
<tr>
<td>Older independents</td>
<td>+3.2%</td>
</tr>
<tr>
<td>Empty nesters</td>
<td>+3.0%</td>
</tr>
</tbody>
</table>

Day trips from home are a major segment of the market

There is an opportunity to attract the local market, especially with high petrol prices and increasing pride in all things local.

The 2012 Olympics, Paralympics and Diamond Jubilee have increased appetite for holidaying in the UK: by instilling pride in our country and highlighting the diversity of destinations.

One in five Brits say the events of 2012 make them more likely to take holidays in England in future.

"I think it has lifted the spirits of the domestic market and makes them want to do more things"

And there has been a sharp decline in visits abroad by GB residents since 2008.

<table>
<thead>
<tr>
<th>GB Outbound</th>
<th>GB Domestic 4+ nt trips</th>
<th>GB Domestic Hols - 1-3 nt trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 35% 12%</td>
<td>Q2 46% 46%</td>
<td>Q3 48% 47%</td>
</tr>
<tr>
<td>Q1 33% 21%</td>
<td>Q2 46% 46%</td>
<td>Q3 49% 45%</td>
</tr>
<tr>
<td>Q1 28% 26%</td>
<td>Q2 40% 40%</td>
<td>Q3 38% 39%</td>
</tr>
<tr>
<td>Q1 39% 33%</td>
<td>Q2 28% 29%</td>
<td>Q3 29% 32%</td>
</tr>
<tr>
<td>Q1 41% 24%</td>
<td>Q2 42% 25%</td>
<td>Q3 41% 27%</td>
</tr>
<tr>
<td>Q1 42% 23%</td>
<td>Q2 44% 22%</td>
<td>Q3 34% 28%</td>
</tr>
<tr>
<td>Q1 44% 29%</td>
<td>Q2 46% 24%</td>
<td>Q3 37% 31%</td>
</tr>
<tr>
<td>Q1 48% 35%</td>
<td>Q2 47% 33%</td>
<td>Q3 37% 36%</td>
</tr>
<tr>
<td>Q1 47% 39%</td>
<td>Q2 46% 38%</td>
<td>Q3 37% 40%</td>
</tr>
</tbody>
</table>

But you cannot assume that people know where your destination is or how long it takes to reach you: geographical awareness is often limited.
Free attractions are proving popular during the recession, but price increases have enabled charging attractions to maintain revenue.

Two important benchmarks for visitor attractions:

**Adult admission charges increased by average of +4% in 2012**

Similar to recent years
- 5% in 2011
- 5% in 2010
- 4% in 2009

**However, gross revenue only increased by average of +1% in 2012:**
- +3% amongst free attractions
- No change for paid attractions

Lower than in recent years
- 5% in 2011
- 5% in 2010
- 8% in 2009

This decline in revenue is explained by a drop in visitor numbers in 2012.

**Annual % change in visits**

This was driven by attractions charging for admission, where there was a 3% decline in visits, contrasting to a 2% increase amongst sites with free entry.

Source: Visits to visitor attractions survey
The economy continues to impact on us all, although signs of improved confidence. Those investing in tough times are reaping rewards, exploiting the opportunity to build loyalty.

The Banking Taskforce’s on-going SME Finance Monitor reports:

- 9% of SME’s in Q4 2012 reported making applications for new/renewed loan or overdraft facilities in past year
- 71% of all applications successful (49% for first timers)

43% of prospective applicants are now confident that their bank would agree to a request, up from 33% in Q3 2012. Only half of SMEs aware of initiatives such as Funding for Lending and the National Loan Guarantee Scheme.

Attractors increasing marketing spend have recently seen stronger growth in visits and revenue:

<table>
<thead>
<tr>
<th>2011 / 12 change in...</th>
<th>Up</th>
<th>Down</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visitor admissions</td>
<td>+3%</td>
<td>-1%</td>
</tr>
<tr>
<td>Local visits</td>
<td>+6%</td>
<td>-14%</td>
</tr>
<tr>
<td>Overseas visits</td>
<td>+8%</td>
<td>+11%</td>
</tr>
<tr>
<td>Gross revenue</td>
<td>+5%</td>
<td>-6%</td>
</tr>
</tbody>
</table>

Our Tourism Business Monitor is full of anecdotal evidence of businesses which have seen the benefits of investing in facilities, products and staff.

Case Study: Bodmin Jail

Our business really is exactly what it says on the tin – we’re an all-weather, family friendly day out.

Although we’ve benefitted from the wet weather recently, as people can come and spend the day here out of the rain, we’re constantly evolving and improving our current offer, which helps us drive repeat visits. For example, this winter we are excavating the lower levels of the jail, which all helps keep our business fresh and means there are always new things for visitors to see.

We have developed additional revenue streams, such as our function suite, which does a good business in weddings, birthdays and other events, in addition to our paranormal work.

We support everything through a concentrated marketing campaign via newspapers, leaflets, websites, and tap into local groups, such as rotary groups and Freemasons.
How can tourism businesses exploit digital revolution?

People are constantly sharing their thoughts and images of your business or destination with others on social networking and online review sites. Are you proactively portraying yourself well on digital channels – your website, social media? Are you dealing with dissatisfied visitors effectively?

Holiday inspiration is now continual, year round.

**Mobile has become massive**
- In 2009 many suggested “one day we will use our phones when we are on trips to source info.” By 2012 this has become a truth across many lifestages. Now regularly used for maps / directions, opening times / ticket prices, Plan B’s / alternatives, local restaurants / bars / entertainment
- Indeed, for pre-families this can be THE source of info, through Apps e.g. Around Me, Taste Card

**Google is usually the first port of call**
- Either a very general search on the first visit e.g. mood, general location, day trip
- Or to find very specific type of holiday or location

**Use picture imagery where you can**
- The influence of pictures cannot be overstated
- Pictures enable the viewer to place themselves in the mood, feeling or emotions of a place
- People-focused pictures are most powerful

**Digital communications offered by visitor attractions: 2012**

- ANY DIGITAL COMMUNICATIONS
  - Facebook page: 67%
  - Twitter account: 55%
  - E-newsletter: 45%
  - YouTube: 29%
  - Online blogs: 17%
  - Flickr page: 16%
  - Mobile website: 10%
  - Other social media: 10%
  - Mobile apps: 7%

*Source: Digital Landscape Research*
The background is an ageing population, but which is staying active much longer.

And a set of emerging traveller types, for example...

Over 60s will hold 50% of world’s wealth in 10 years. They want to keep the body and mind stimulated and meet like minded people.

Emergence of extended families and singles travel: you need flexible rooms, spaces, ticketing etc.

Generation Y born since 1982. They expect personal, tailored visit experiences and are spontaneous / late bookers.