

GVA Humberts Leisure

July 2011

Coastal Planning & Regeneration

An overview of the
coastal leisure
industry both
urban and rural

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gva.co.uk

Coastal Planning & Regeneration

- Economic & Tourism T
- Key Issues
- Roles
- Industry Overview
- Planning Implications



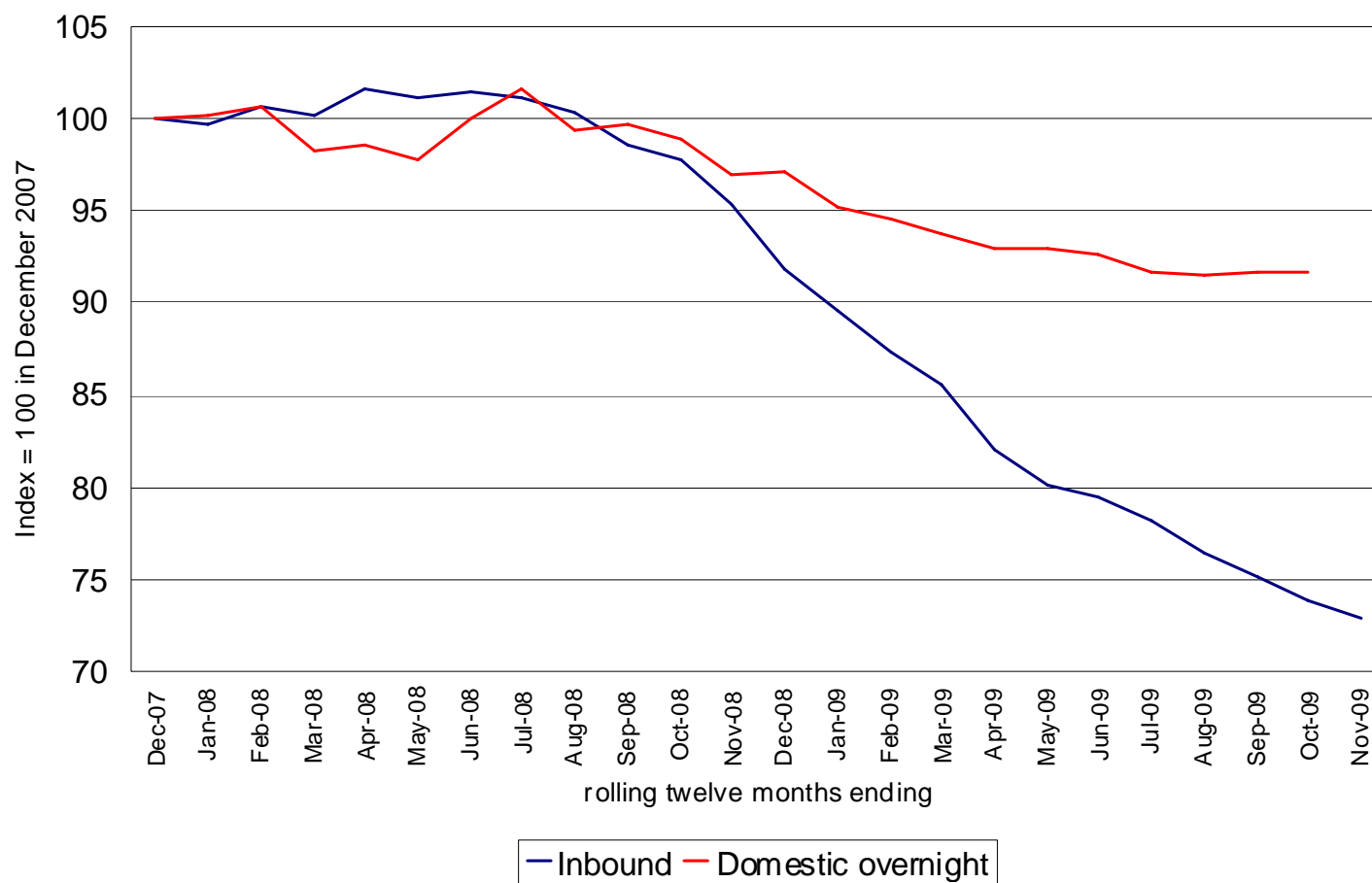
Economic trends

- Private sector pay cuts
- Public sector job cuts
- Increased taxes - VAT
- Inflationary pressures
- Low interest rates
- Ireland/Greece/Portugal
- Slow growth/no growth/d
- Weak pound
- Less disposable income



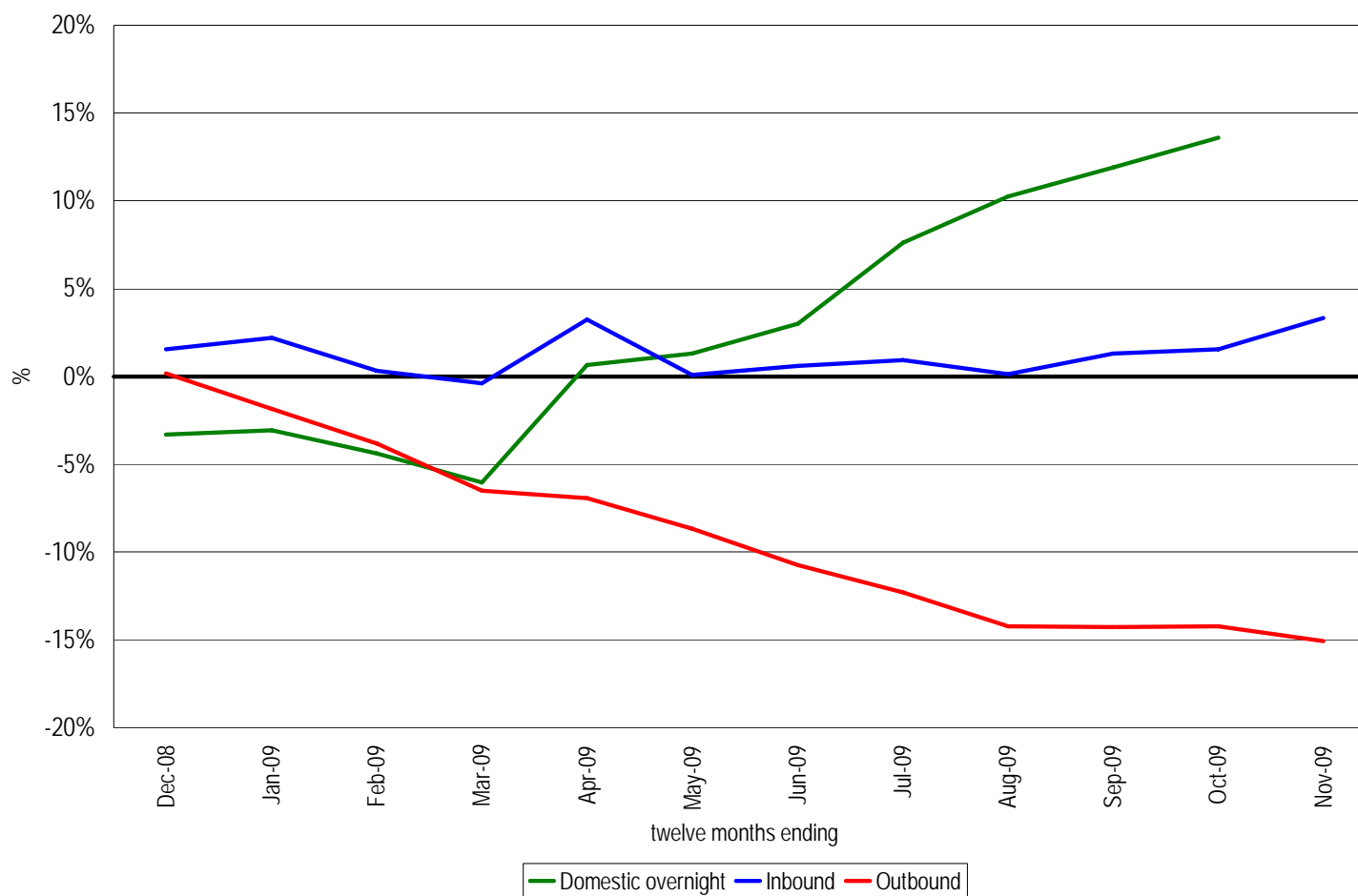
Headline Tourism Trends

- Business tourism down



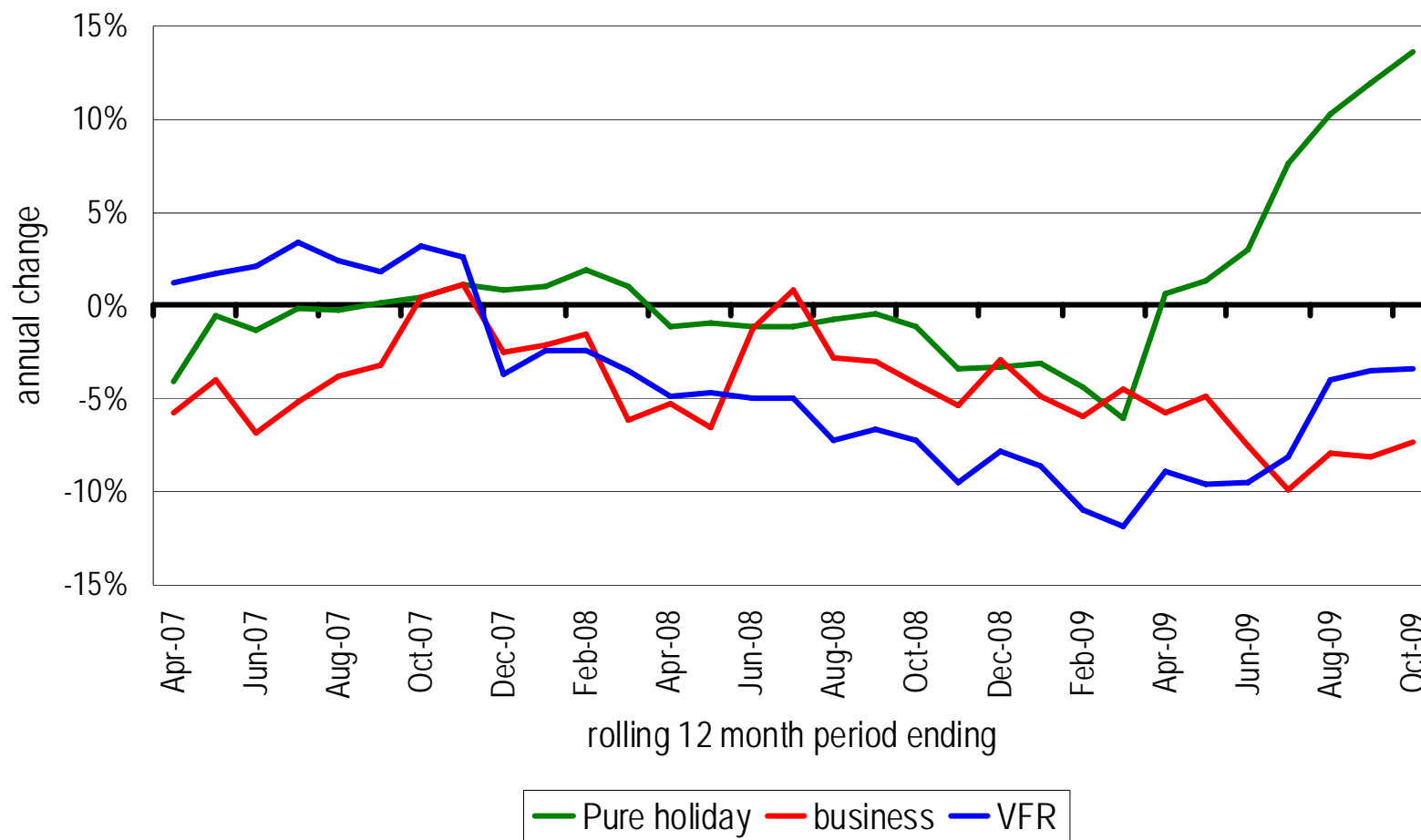
Headline Tourism Trends

- Holiday tourism up

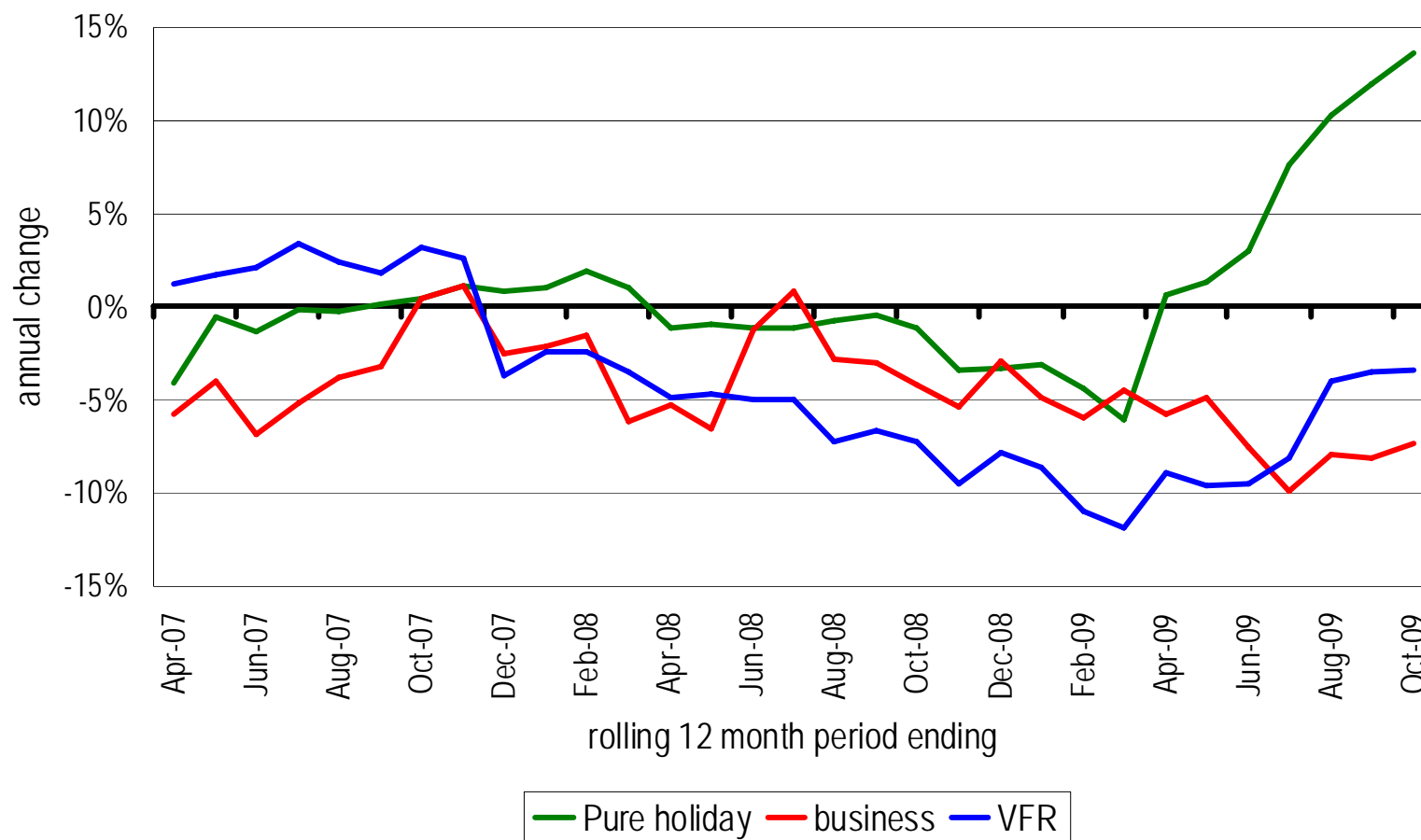


Headline Tourism Trends

- 'Staycation' effect

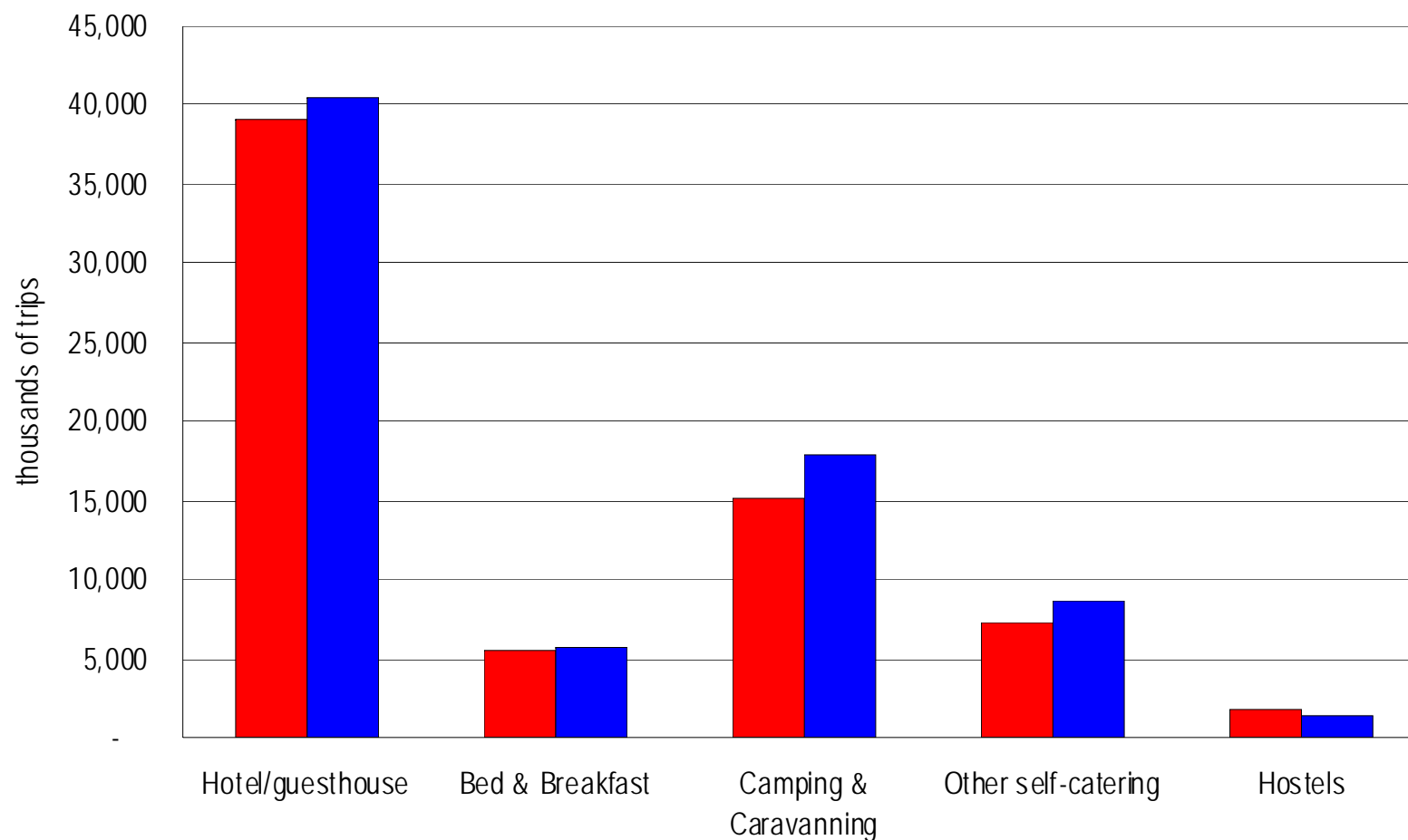


2009 – year of the ‘Staycation’



Headline Tourism Trends

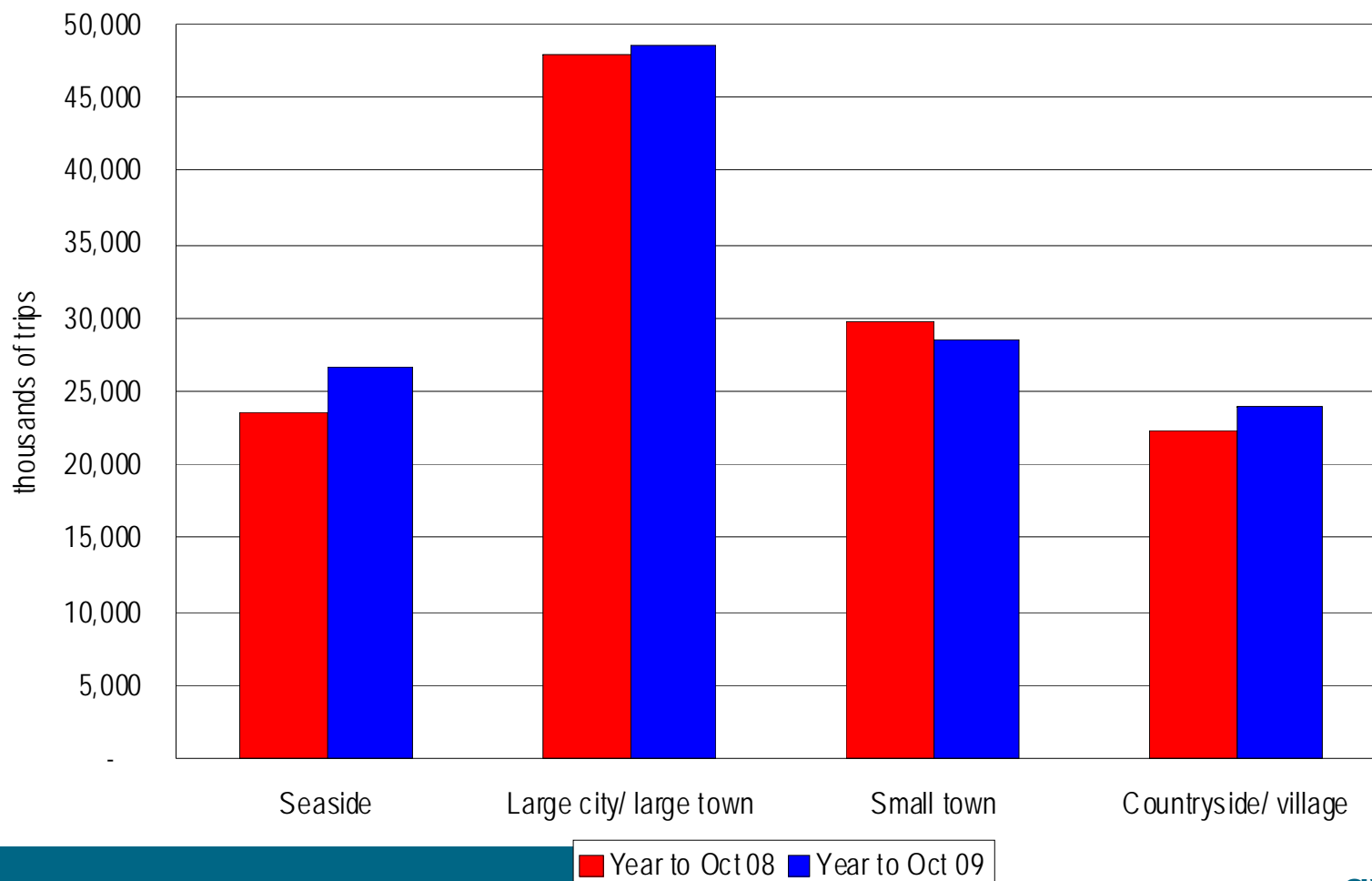
- Domestic Nights by Accommodation type



■ yr to Oct 08 ■ yr to Oct 09

Headline Tourism Trends

- Domestic Nights by Location





Importance of Coastal Leisure

- Job Creation
 - 210,000 directly employed in seaside tourism
 - 19,000 in Blackpool
 - 12,000 in Brighton
 - 600,000 direct and indirect jobs
- Economic Output (Gross Value Added)
 - £3.6 bn direct
 - £10 bn after multiplier

(The Seaside Tourism Industry in England & Wales, Centre for Regional Economic and Social Research, Sheffield Hallam June 2010)



Key Issues for Coastal Leisure Business

- Staycation
- Seasonality
- Competing locations
- Competing uses
- Climate Change



Coastal Leisure Industry

- Destination Businesses
 - Visitor Attractions
- Visitor Accommodation
 - Hotels/Guest Houses/B&B (Serviced)
 - Caravan/Holiday Parks, Self Catering (Unserviced)
- Supporting Businesses
 - Pubs, Restaurants, Cafes, Shops
- Roles
 - Public sector – destination
 - Private sector – individual businesses

A Key Role for the Public Sector

- Creating the right conditions for private investment
 - Clean Beach
 - Green Space
 - Play Areas
 - Public Realm
 - Access & Parking
 - Links between town and seafront
 - Business friendly planning and licensing
 - Create a USP



Visitor Attractions

- Diverse Sector
 - Piers



Visitor Attractions

- Diverse Sector
 - Piers
 - Aquariums



Visitor Attractions

- Diverse Sector
 - Piers
 - Aquariums
 - Museums



Visitor Attractions

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 - Theme Parks



Visitor Attractions

- Diverse Sector
 - Piers
 - Aquariums
 - Museums
 - Theme Parks
 - Sports





Visitor Attractions

- Diverse Sector
 - Types
 - Operators
 - ä Merlin Entertainments
 - ä 5-6 medium sized
 - ä 1600 individual private
- Subsidised competition
 - ä 4500 publicly funded
 - ä Lottery funding
- Customer demands
 - Value for money
 - Experience
 - Something New



Visitor Attractions

- All weather
- Huge Magnet
 - Blackpool Please Beach 6m
 - Brighton Pier 4.5m
 - Grand Pier, Weston 300k week 1
- High Costs
 - Refresh
 - Annual Maintenance
 - Rebuild
 - Grand Pier £50m
 - Herne Bay Pier £8-12m
 - Queens Pier £5-11m
 - Boscombe Pier £2.4m
 - Margate Dreamland £12.5m



Hotels

- Major hotels
 - Conferencing
 - ä Avoiding seasonality
 - ä The three B's
 - ä Inland competition
 - ä Smaller/specialist conferences
 - Alternatives
 - ä Culture
 - ä Spas
 - ä Sports



Hotels

- Smaller Hotels
 - B&B
 - Guest Houses
 - Budget Chains



Hotels

- Smaller Hotels

- Choices

- Lifestyle
 - Boutique
 - Holiday Flats
 - Housing
 - HMOs



Holiday Parks

- Customer's Image
- Sector Importance
 - 22% of all UK tourist nights
 - £3bn direct spend (UKTS 2009)
- Staycation & Growing Demand
 - Rental fleet
 - Sales fleet
 - Facilities
- Rising aspirations
 - Lodges
 - Holiday cottages



Holiday Parks

- Planner's Image
- Planning constraints
 - Landscape
 - Ecological
 - Flood risk
 - Erosion
 - Permanence



Holiday Parks

- Landscape & Ecology



Holiday Parks

- Flood Risk & Erosion
 - £m falling into sea
 - Only economy in some rural areas
- PPS25 Supplement on Coastal Erosion
 - Time limitation
 - Relocation/roll back
- PPS25 Flood Risk
 - More vulnerable
 - Sequential test
 - Exception test
 - Flood Warning and Evacuation





Holiday Parks

- Permanence
 - Touring



Holiday Parks

- Permanence
 - Touring
 - Extending the season
 - Statics



Holiday Parks

- Permanence
 - Touring
 - Extending the season
 - Lodges



Holiday Parks

- Permanence
 - Touring
 - Extending the season
 - Holiday Cottages
 - Good Practice Guide



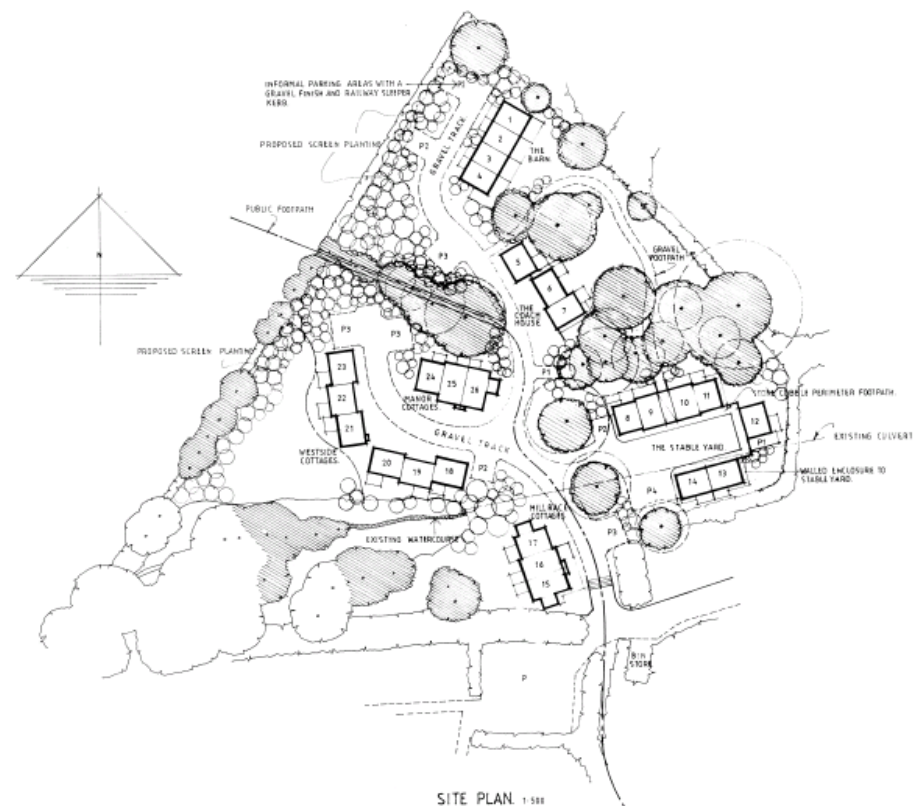
Holiday Parks

- Permanence
 - Touring
 - Extending the season
 - Holiday Cottages
 - Good Practice Guide
 - Isle of Wight Case Study



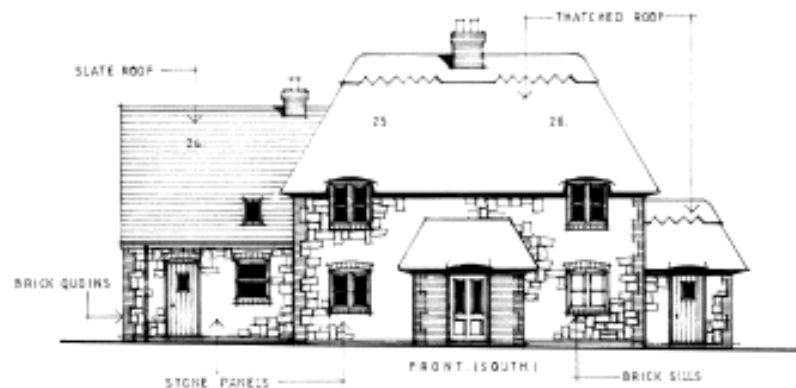
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Holiday Parks

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Holiday Parks

- Permanence
 - Touring
 - Extending the season
 - Sales
 - ä Sales & Letting
 - ä Planning Control
 - ä Appeal Cases





Concluding Comments

- Major market changes
 - Staycation & longer season
 - Better value & higher quality
- Major role for public sector
 - Creating a unique destination
 - Planning for structural change
 - Planning for climate change