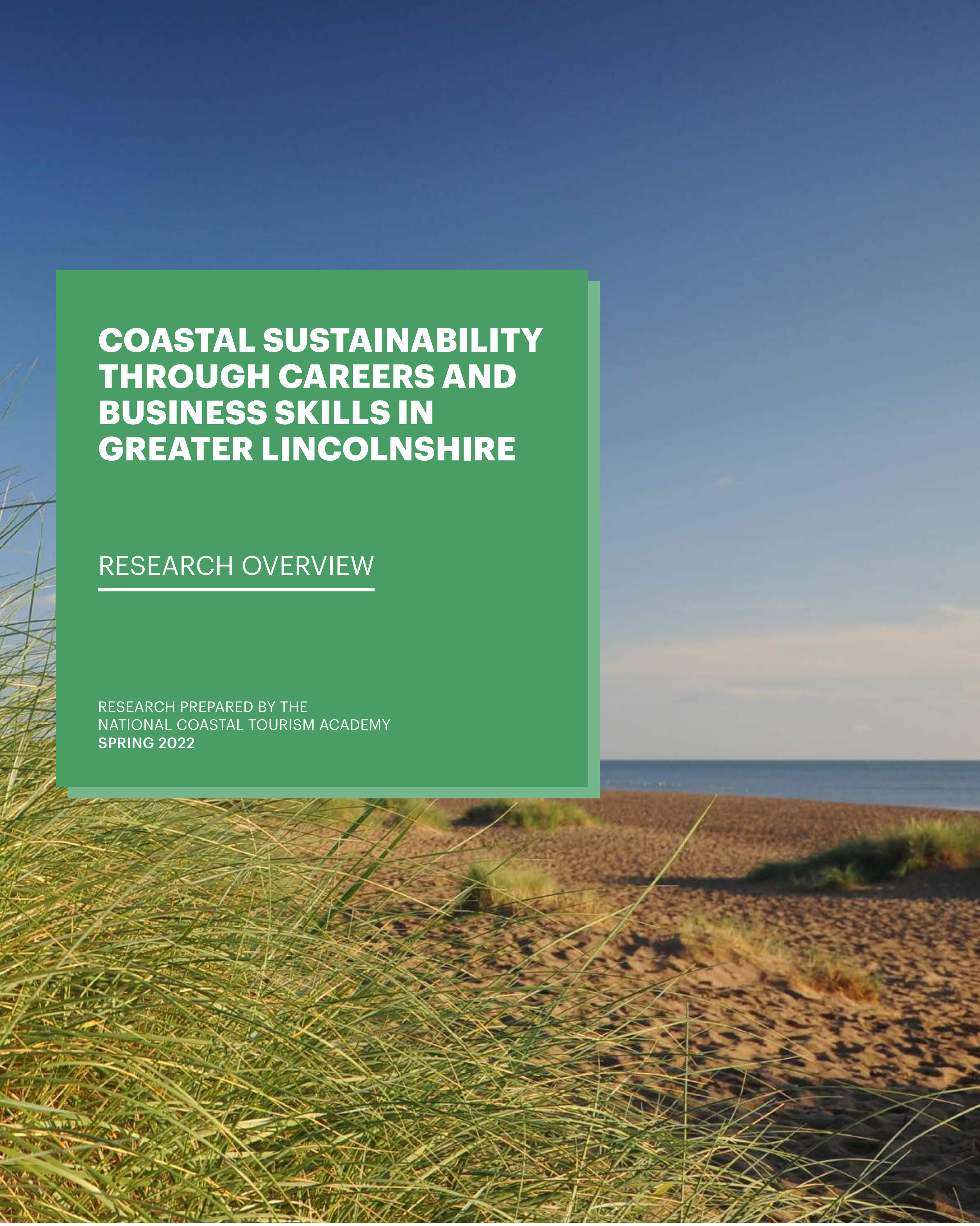
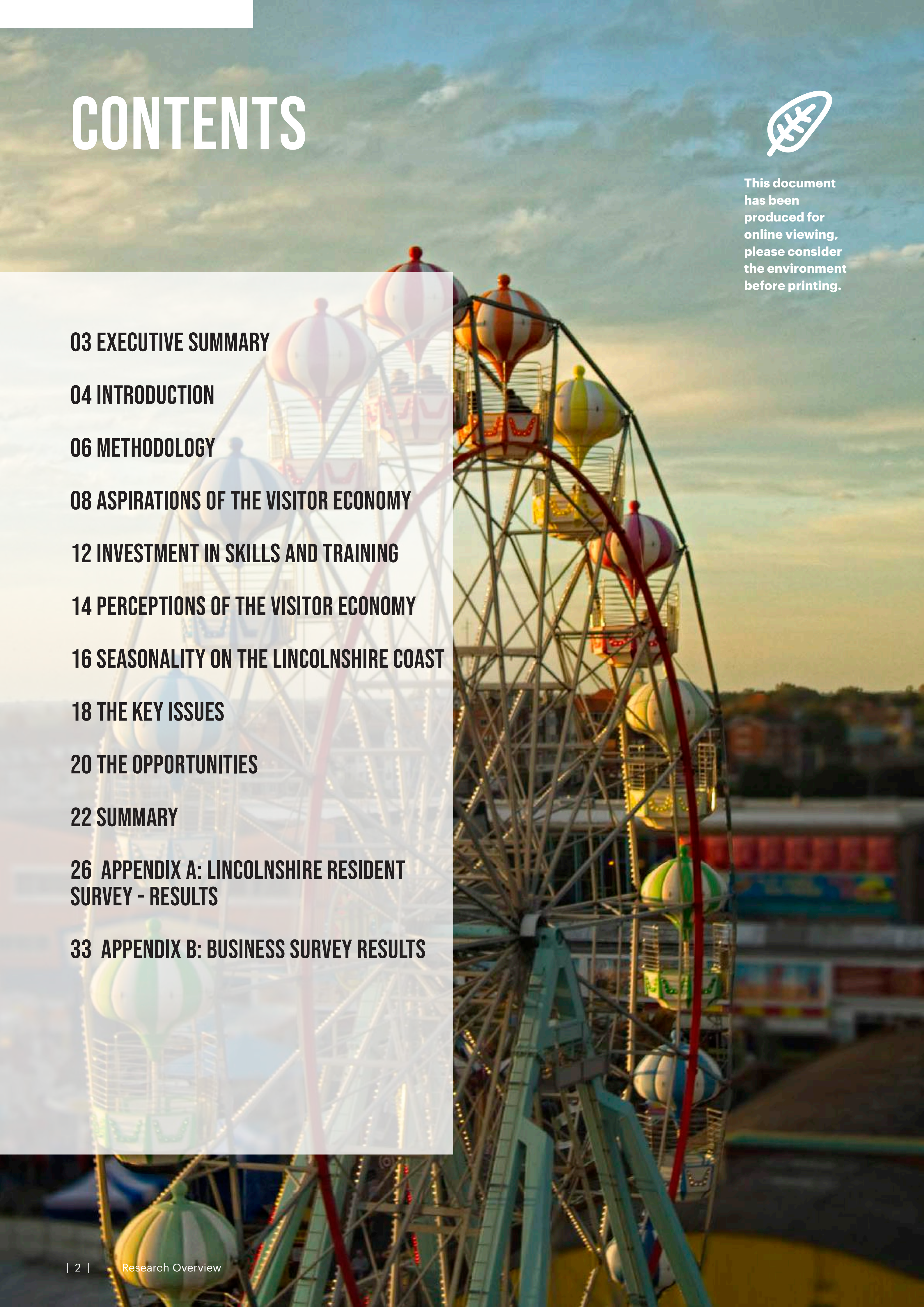


COASTAL SUSTAINABILITY THROUGH CAREERS AND BUSINESS SKILLS IN GREATER LINCOLNSHIRE

RESEARCH OVERVIEW

RESEARCH PREPARED BY THE
NATIONAL COASTAL TOURISM ACADEMY
SPRING 2022



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EXECUTIVE SUMMARY

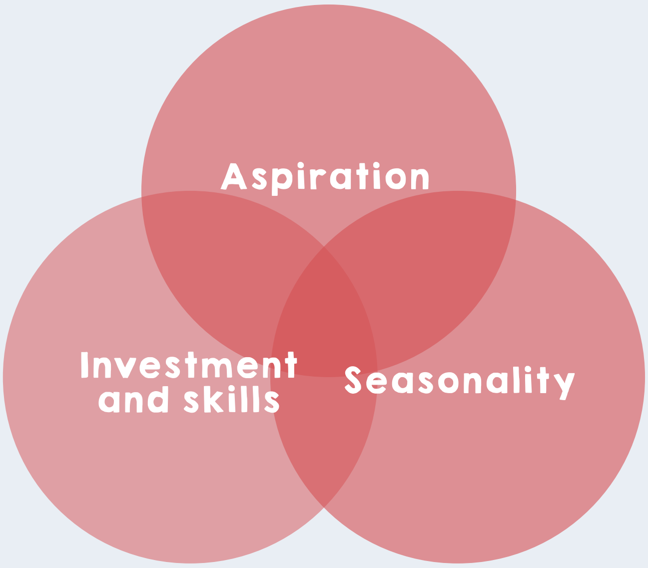
The Coastal Sustainability through Careers and Business Skills research report explores three key interlinked areas; aspiration of businesses and residents on the Lincolnshire Coast; investment in skills and training; and the impact that seasonality has on skills, training and aspiration. The research drew comparisons across other coastal locations and the national coastal visitor economy to determine whether the results were unique to the Lincolnshire Coast.

The research identified that the aspiration levels for residents on the Lincolnshire Coast were higher than the comparator coastal locations and 61% of under 35s living on the Lincolnshire Coast stated that they are keen to develop and learn new skills.

Whilst engagement by visitor economy businesses in funded skills and training programmes was relatively low (14%), the most significant barriers to engagement focused on the challenges of "finding out what is available" and "what they are eligible for". Residents expressed similar challenges in finding out what skills and training opportunities were available to them, but their biggest barriers to engagement focused on the flexibility and timing of existing schemes and the commitment required – these concerns were also expressed by businesses and were similar across other coastal locations.

There are significant opportunities to increase engagement in skills and training initiatives by targeting support on the willing and making it easier for businesses and residents to understand what is available and by providing clear benefits to engagement. Making it easier for likeminded businesses to collaborate and share best practice and identifying their next steps to professional development along the learning journey will also help to drive change.

However, the research also identified that the Lincolnshire Coast is the most seasonal in England, and that the seasonality of the destination is impacting on business development and limiting the opportunities to create a step-change in skills. Whilst some improvements can be made, they are restricted unless seasonality is addressed. To significantly increase engagement in skills and training programmes, as well as increase confidence in investment in the Lincolnshire coastal visitor economy, a plan to address seasonality must be developed and agreed by all stakeholders.



The visitor economy on the Lincolnshire Coast, pre-Covid, generated a visitor spend of £543m hosting 2.9 million visitors and supporting 6,435 FTE jobs. During Covid-19 the coastal staycation boom exposed new audiences to the wealth of untapped potential that the Lincolnshire Coast has to offer.

Focusing on converting day visits to overnight visits, identifying year-round markets that complement the existing product offer and which can be fulfilled through the current trading mix – such as the natural coast offer – could increase visitor spend to £660m and reduce seasonality to enable an increase in investment confidence and the number of year-round employment opportunities. This activity alongside the changes to skills provision would result in a significant increase in skill levels and engagement across the Lincolnshire Coast.

BACKGROUND

The Greater Lincolnshire LEP, in partnership with Lincolnshire County Council, was awarded Coastal Communities Fund funding in 2019 for a *Visitor Economy Coastal Careers, Employment and Skills* project on the Lincolnshire Coast. The primary focus was to tackle skills gaps in the coastal community around seasonal needs; improve the quality of life of residents; and support the development of a year-round visitor economy, allowing local businesses to grow and become sustainable with a local supply of skilled staff.

The project has three key activity strands piloting locally-owned responses to the unique challenges of this seaside coastal strip:

A. Coastal Careers
Raising aspirations through profiling local career opportunities and piloting greater skills transferability and progression

B. Skills Innovation
Partnering with visitor economy employers to identify and respond to local skills gaps and shortages, providing off-season training programmes and fostering employability and apprenticeships

C. Coastal Evidence Base
Contributing to the regional and national evidence base through an ambitious research project that seeks to understand and tackle real or perceived barriers faced by the local coastal community and economy such as seasonality, low business and skills investment and low aspiration.

INTRODUCTION

The National Coastal Tourism Academy (NCTA) was commissioned to undertake a research project to support the 'Coastal Sustainability through Careers and Business Skills in Greater Lincolnshire' coastal community fund project.

This particular research focused on the Lincolnshire Coast from Skegness to Mablethorpe and covered the following core research themes:

ASPIRATION
Greater Lincolnshire's Coastal Communities and perceived 'low aspirations.'

INVESTMENT
Perceptions of low private and public sector investment in Lincolnshire's coastal areas and also perceptions of low take-up of national or locally channelled funded employment, skills and business support.

SEASONALITY
How seasonal is the Lincolnshire coast? What is the impact of seasonality on residents and businesses?

The research will seek to draw comparisons across other coastal communities to establish how unique the Lincolnshire coastal strip is. It will also seek to consider the local and national policy implications in respect of Levelling Up and Local Economic Growth.

The research has involved a mixed methodology and in-depth discussions with key stakeholders in the visitor economy across Lincolnshire including Lincolnshire County Council, East Lindsey District Council, Lincolnshire Coastal Destination Business Improvement District, Greater Lincolnshire Local Enterprise Partnership and a wide range of skills providers and visitor economy businesses and stakeholders.

THE RESEARCH WAS SEEKING TO GAIN A DEEPER UNDERSTANDING OF THE INTERCONNECTIVITY OF THE ABOVE ISSUES, ARE THEY ALL EQUAL? WHICH ARE THE KEY LEVERS THAT CAN AFFECT CHANGE? AND IN WHAT ORDER?

METHODOLOGY

This research report followed a mixed methodology consisting of the following stages:

1. **Review all existing national and local data:** including unpublished research undertaken by Lincolnshire stakeholders.

   The research team discovered very limited data on the key research themes. National tourism statistics showed the Lincolnshire coast to be one of the most seasonal seaside regions, and previous local research identified that skills issues were in line with national visitor economy challenges with businesses feeling provision was not aligned to the needs of industry (mainly related to the timing of available programmes).

2. **Stakeholder briefings** – alongside the review of existing data, briefing sessions were held with representatives from the Local Enterprise Partnership and the Project stakeholder group comprising tourism officers, skills and business representatives to share initial findings, options for comparator locations and format for the next stages of the research.

3. **Lincolnshire Business and Resident surveys** – online surveys were created and shared through each of the Lincolnshire stakeholder's networks and via the National Coastal Tourism Academy's network. In addition, the resident's survey was shared via social media community groups for the Lincolnshire Coast and in addition the NCTA purchased a representative sample of respondents to ensure a minimum sample size. In total 517 responses were received for the residents' survey and 63 responses for the business survey. The resident survey sample provided a good representative sample for the Lincolnshire coast. The business survey contained a lower than expected take up by Bed and Breakfast establishments and therefore represented a very slight skew towards larger self-catered accommodation and attractions, this bias was addressed in the 1-2-1 interviews.

4. **Comparator review** – the business and resident surveys were also repeated across the comparator locations of Great Yarmouth, Clacton-on-Sea and Weston-Super-Mare alongside a national coastal sample. This enabled the research to identify issues that were unique to the Lincolnshire coast versus those that are more general coastal community or national issues. The sample size for the national business survey sample was 242 and the residents' sample was 470.

5. **Business interviews on key issues arising from surveys** – to explore some of the key themes from the business survey, in-depth online interviews were undertaken with a mix of businesses across the Lincolnshire coastal region. Each interview followed a semi-structured open question format and lasted between 30-90 minutes depending on how engaged the business was. In total ten interviews were undertaken.

6. **Stakeholder workshops on skills and seasonality** – two stakeholder workshops were undertaken virtually. The first focused on the skills issues arising from the survey and interview work to date and included nine skills and training specialists who have worked or are based in the Lincolnshire area. Many were involved in training delivery as part of the wider Coastal Communities Fund project.

   The second online workshop was focussed on the seasonality issues arising from the research to date and included eight representatives from the visitor economy across the region including the County and District Council, Skegness Chamber of Commerce, Lincolnshire Coast Business Improvement District and Business Lincolnshire.

7. **1-2-1 stakeholder conversations** – the headline research findings and draft recommendations were shared with the project team and then separately across nine meetings with the following stakeholders, giving each the opportunity to help shape the recommendations and provide feedback and comment individually. These included:

   Lincolnshire County Council, East Lindsey District Council, Lincolnshire Coastal Destination Business Improvement District, Greater Lincolnshire Local Enterprise Partnership (Officers and Visitor Economy Board), Destination Lincolnshire.

   Presentations of the research findings were also delivered to the Project Stakeholder Board and Coastal Developers Forum.

   Following the conclusion of the 1-2-1 discussions, the revised draft recommendations were shared again with representatives of the stakeholders above to allow for final comments and feedback.

8. **Recommendations** - the final recommendations and action points are being discussed with partners.

The research was completed by the National Coastal Tourism Academy (NCTA) between July 2021 and March 2022.

ASPIRATIONS

HALF OF RESIDENTS, OWNERS AND WORKERS ARE

"KEEN TO DEVELOP AND LEARN NEW SKILLS RELEVANT TO THEIR ROLE"

RISING TO 61% OF UNDER 35s.

The report considers the combined results of the literature review, residents survey, business survey, stakeholder workshops and interviews for each of the key themes of the research: Aspiration, Investment, Perception and Seasonality.

Understanding aspirations and perceptions of the visitor economy on the Lincolnshire coast and other coastal areas is key to effecting change. There was a concern that the aspirations of the residents and businesses on the Lincolnshire coast may be lower than other coastal areas, however the research did not find this to be the case.

Whilst 39% of visitor economy business owners/managers stated that they are "content with their own current skills level and development", which was a broadly similar result to the responses for all Lincolnshire residents (34% are content with current skills level). The number of Lincolnshire residents and business owners keen to develop their skills was higher than the comparator locations and particularly high among those working in the visitor economy

HOW WOULD YOU DESCRIBE YOURSELF?

	All Lincolnshire residents	Visitor economy workers	Under 35s	Comparator locations	Visitor Economy Business Owners
I am content with my current skills level	**34%**	**57%**	**26%**	**39%**	**39%**
I am keen to develop and learn new skills relevant to my current job	**38%**	**48%**	**61%**	**34%**	**52%**
I am keen to develop and learn new skills in a different field	**28%**	**37%**	**43%**	**21%**	**11%**
My main priority is paying my bills, providing for myself/ family	**32%**	**35%**	**42%**	**30%**	**-**
I work purely to support outside goals (e.g. studying for another career)	**13%**	**15%**	**23%**	**3%**	**4%**

However, the visitor economy business owners and managers felt that just 17% of their staff were content with their current skills level and that almost half (44%) would be "keen to develop and learn new skills relevant to their job" this shows a difference of opinion between visitor economy workers where more than half (57%) were content with their current skills level, though 48% did agree that they wished to develop their skills.

The results show that aspiration is not a problem for the majority of the population across the Lincolnshire Coast and compared to the comparator coastal destinations showed a marginally higher percentage keen to develop their skills.

The business survey results showed that many businesses on the Lincolnshire coast had a growth mindset (once they have recovered from covid) with interest in growing and developing the business higher than results across all coastal locations.

IN TERMS OF YOUR PLANS FOR THE FUTURE, WHICH OF THE FOLLOWING BEST DESCRIBES YOUR ATTITUDE TOWARDS YOUR BUSINESS?

	Lincolnshire Coast	National
I am establishing a new business	5%	5%
I am trying to recover to pre-Covid levels and then am content with my operating business level	3%	13%
I am content with my current business level	8%	17%
I am trying to grow my business	43%	28%
I am trying to recover then grow my business	25%	21%
I intend to sell/ retire within the next 5 years	13%	12%
Don't know / cannot say	5%	4%

Note the sample size for this question on the Lincolnshire results was smaller than the main sample

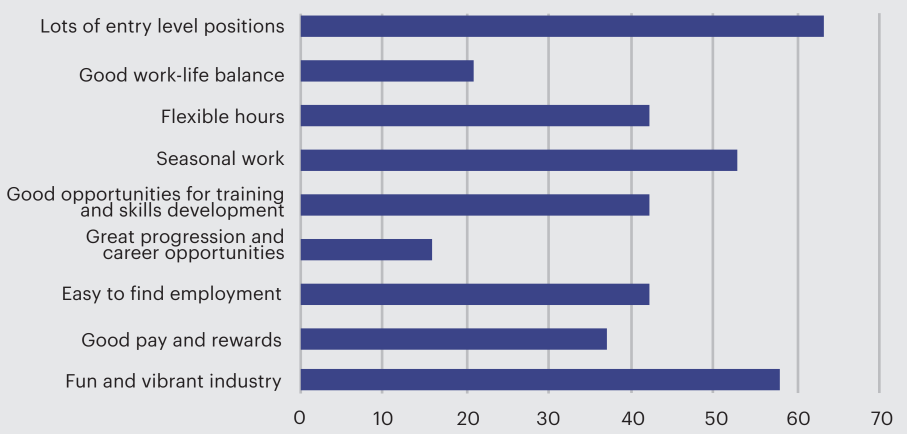
Considering these results and the conversations with businesses through the 1-2-1 interviews and stakeholder workshops it would appear that the aspiration of businesses and residents on the Lincolnshire coast is similar to, if not higher, than other coastal locations in England.

ADDITIONAL INSIGHT : UNEMPLOYED

The high level of response to the residents survey enabled a series of sub-sets of data to be reviewed and revealed some interesting insights.

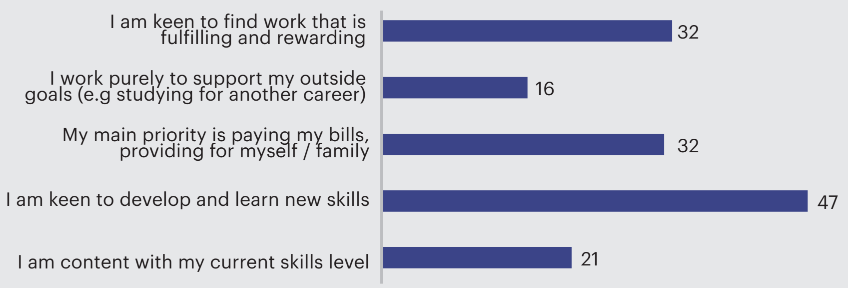
For those respondents that stated they were unemployed at the time of the survey, respondents were generally more likely to be positive about the visitor economy than average.

OPINIONS OF A JOB IN THE VISITOR ECONOMY



The proportion expressing that they were keen to develop new skills was higher than all resident responses on average.

HOW WOULD YOU DESCRIBE YOURSELF



In terms of their barriers to engagement in funded skills and training initiatives, their top responses differed greatly to other residents, with their top concerns:

1) I'm worried about the level of support from friends and family

2) Cost of attending isn't covered by funding (e.g. transport, food, equipment etc)

Those unemployed were much more likely to expect training to take place within working hours compared to all residents (55% versus 37%).

This insight into the concerns of those unemployed should be considered when new initiatives are designed to reduce as many barriers as possible to encourage and support the individuals back into work.

UNEMPLOYED

- They were generally more likely to be positive about the visitor economy than average
- The proportion expressing that they were keen to develop new skills was higher than all resident responses on average
- Barriers to engagement – top responses 1) I'm worried about the level of support from friends and family 2) Cost of attending isn't covered by funding (transport, food, equipment etc)
- Those unemployed were much more likely to expect training to take place within working hours compared to all residents.

ADDITIONAL INSIGHT : UNDER 35s

There was a good response rate to the residents survey from those aged under 35, with the results indicating that under 35s living on the Lincolnshire coast are generally more likely to be positive about the visitor economy than the whole resident population.

The proportion expressing that they were content with their current skill level was significantly lower than the average and therefore those keen to develop new skills was much higher than the average (61%)

HOW WOULD YOU DESCRIBE YOURSELF?

	All	Visitor Economy	Under 35s	Comparator Locations
I am content with my current skills level	34%	57%	36%	39%
I am keen to develop and learn new skills relevant to my current job	38%	48%	61%	34%
I am keen to develop and learn new skills in a different field	28%	37%	43%	21%
My main priority is paying my bills, providing for myself/ family	32%	35%	42%	30%
I work purely to support outside goals (e.g. studying for another career)	13%	15%	23%	3%
I am keen to find work that is fulfilling and rewarding	18%	20%	21%	17%
I am unable to work	6%	5%	7%	5%
I am retired	21%	0%	1%	15%
Not sure	1%	2%	1%	1%
Other	3%	2%	0%	0%

Under 35s were much more likely to have engaged with a funded training or skills programme than all residents and had a greater awareness of the opportunities.

They showed a higher concern in their ability to complete any training.

They were much more willing to undertake training outside their normal working hours provided their time was paid.

WHAT ARE YOUR THOUGHTS ON WHEN TRAINING SHOULD BE CARRIED OUT?

	All	Visitor Economy	Under 35s	Comparator Locations
I expect any training to be undertaken within my paid working hours	37%	49%	21%	48%
I am willing to undertake training outside my normal working hours if I get paid or the time back	46%	37%	63%	33%
I am happy to undertake training at any time (subject to notice)	17%	11%	7%	17%

UNDER 35s

- Were generally more likely to be positive about the visitor economy
- The proportion expressing that they were content with their current skill level was significantly lower than the average and therefore those keen to develop new skills was higher than average
- Under 35s were much more likely to have engaged with a funded training or skills programme than all residents and had a greater awareness of the opportunities
- They showed a higher concern in their ability to complete any training
- They were much more willing to undertake training outside their normal working hours provided their time was paid

INVESTMENT IN SKILLS AND TRAINING

The Lincolnshire Coast business survey backed up earlier research that showed a **relatively low engagement in funded training and skills programmes with only 14% of businesses on the Lincolnshire Coast saying they had participated** in some form of funded training or skills initiative in the last three years. Those that had tended to be larger organisations, non-serviced accommodation and visitor attractions.

Businesses that had engaged with funded training programmes had different aspirations to the wider business population, the owner/managers were more likely to want to develop their own skills and they are investing more in their business.

Finding what is available (35%) and what they are eligible for (37%) are the biggest barriers for businesses for engaging in training and skills programmes, followed by flexibility of schemes to meet their needs (22%)

"IT'S TOO COMPLICATED TO FIND OUT WHAT'S AVAILABLE"

"IT'S NEVER AVAILABLE WHEN I NEED IT"

Consulting with skills providers as part of the skills workshop activity, **skills providers believe this is a common issue for SMEs** across the UK and not uniquely a Lincolnshire or coastal issue. This is reinforced by the national coastal business survey which showed the same results.

WHICH OF THE FOLLOWING EMPLOYMENT AND SKILLS SCHEMES HAVE YOU BEEN INVOLVED WITH?

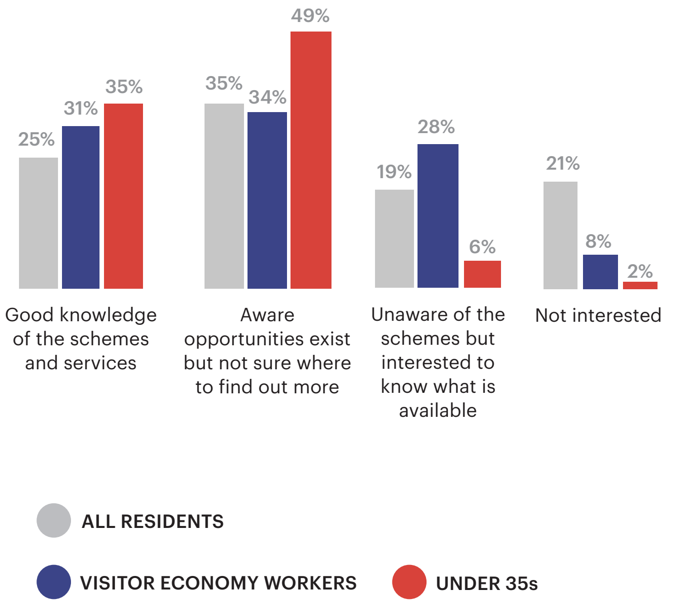
Apprenticeships	14%
Back to Work / Job Centre plus schemes	5%
CareerNet	2%
Kickstart Scheme	14%
Locally funded schemes (e.g. Local Authority / LEP / CCF)	6%
Skills Support for the Workforce	3%
Traineeships	2%
T Levels	0%

WHAT BARRIERS, IF ANY, IMPACT YOUR USE OF FUNDED SKILLS AND TRAINING SCHEMES?

Finding out what is available	35%
Understanding what my business is eligible for	37%
Completing registration and other paperwork	13%
Timing of the programmes (time of day, day of week)	9%
Timing of programmes (times of year)	13%
Length of the programmes	4%
Cost of staff time to attend	17%
Schemes clash with busy times in business	17%
Lack of flexibility in programmes to match your business needs	22%
Ability to commit in advance to participation	13%
Additional costs not covered by the funding (e.g. travel, expenses)	13%
Other (please specify)	33%

"ONLY 14% OF BUSINESSES ON THE LINCOLNSHIRE COAST SAID THEY HAD PARTICIPATED IN SOME FORM OF FUNDED TRAINING OR SKILLS INITIATIVE IN THE LAST THREE YEARS"

RESIDENT AWARENESS OF SKILLS AND TRAINING OPPORTUNITIES



Resident engagement in funded training and skills programmes was much higher than businesses with almost 50% stating they had participated in at least one programme. Younger residents (under 35s) were much more likely to be aware of the opportunities available and Visitor Economy workers were keen to know more about what opportunities exist.

However, resident visitor economy workers agree with businesses that the top barriers to engagement in skills and training initiatives are flexibility (26%), timing (25%), commitment (22%) – closely followed by additional costs incurred. 18% don't know how to find out what is available. Under 35s had similar results but were also worried about being able to complete the training (21%).

Those residents that have used funded training schemes had different barriers to engagement, with the top results being the flexibility of schemes, timing and costs.

Interestingly, the main barrier for those unemployed is concern "over level of support from friends and family" and "cost of attending not covered by funding"

Most employees state that they would actively look for suitable training and development opportunities (42%), but more than a third (37%) of visitor economy workers and more than half (58%) of under 35s would trust their employer to identify suitable training opportunities.

The majority of workers expect training to be completed within paid working hours (49%), although attitudes were different amongst younger residents, with 63% of under 35s willing to undertake training outside normal hours provided they are paid for the time.

These results on engagement with funded skills and training programmes were similar across each of the comparator locations and based on provider feedback are not uniquely coastal issues and therefore not uniquely a Lincolnshire Coast issue.

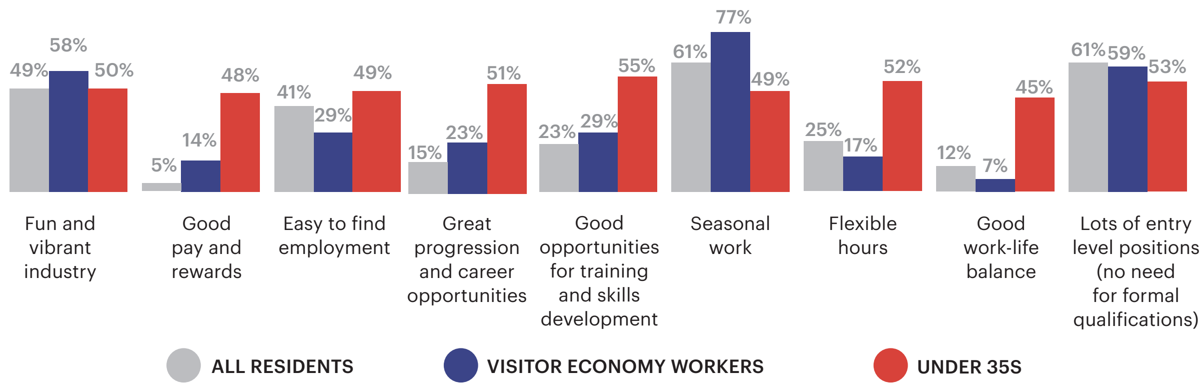
However, what is unique to coastal areas and more extreme on the Lincolnshire Coast, is the seasonality dimension which provides a limited window of opportunity each year to engage businesses in skills and training programmes which makes the pace of change and development much slower. This can make programmes such as Apprenticeships 'out of bounds' due to a minimum 12-month requirement.

PERCEPTION

The research examined the perceptions that residents and workers had of the visitor economy on the Lincolnshire coast to establish to what extent residents understand the importance of the sector and the benefits that are gained from living in a vibrant visitor economy destination.

The research found that half of residents think the visitor economy is a "fun and vibrant industry", rising to 58% of those working in the visitor economy. Many recognise that it does provide lots of entry level positions and is easy to find employment in the sector but believe it is poorly paid and doesn't provide good career progression. However, those working in the industry have more positive views and under 35s in particular see the benefit of flexible hours and good work-life balance.

NET AGREEMENT OF OPINIONS ABOUT THE VISITOR ECONOMY

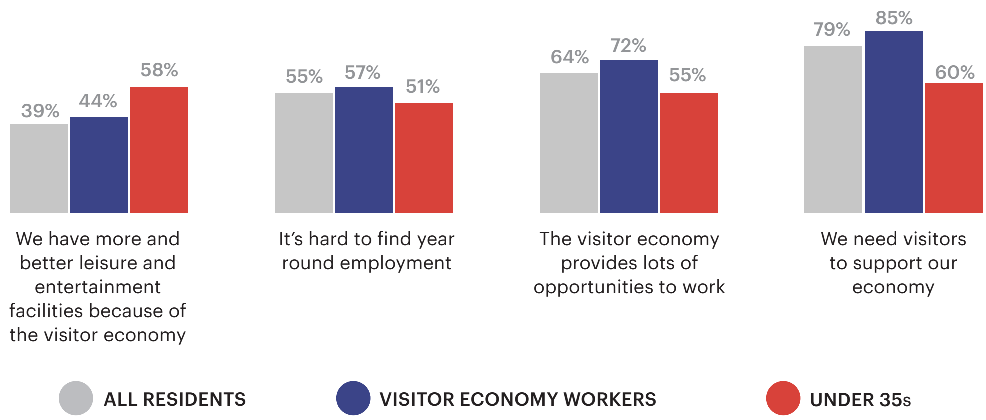


Residents recognise the importance of the visitor economy to the wider economy, scoring the importance at 81/100 (where 100 is critically important and 0 not at all important), and that it provides lots of opportunities for work (64% of all residents), but the majority say it’s hard to find year-round employment.

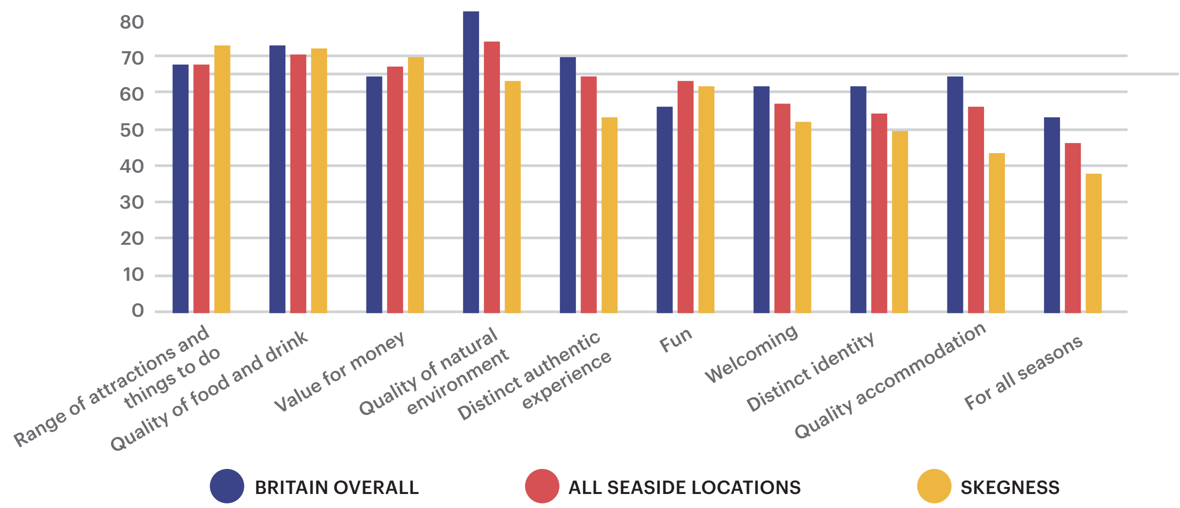
HOW IMPORTANT IS THE VISITOR ECONOMY TO LINCOLNSHIRE COAST?

The benefits in facilities across the Lincolnshire Coast are not especially attributed to the visitor economy (only 39% of all residents feel they have better facilities because of visitor economy).

NET AGREEMENT WITH FOLLOWING STATEMENTS ABOUT THE VISITOR ECONOMY



VISIT ENGLAND DESTINATION REPORTS - PERCEPTIONS BY VISITORS AND GB HOLIDAY MAKERS



The national consumer perception of Skegness is that it is a welcoming and friendly location with a reasonable range of attractions and things to do. The quality of the accommodation ranked among the lowest of coastal destinations and consumers did not feel the seaside town offered a 'distinct authentic experience'.[1]

Perceptions of the visitor economy across the resident population were similar across comparator locations, except for the recognition that residents "have more and better leisure and entertainment facilities because of the Visitor Economy", more than half the resident population in other coastal areas had a net agreement with this statement.

1 VisitEngland Destination Reports 2018

SEASONALITY

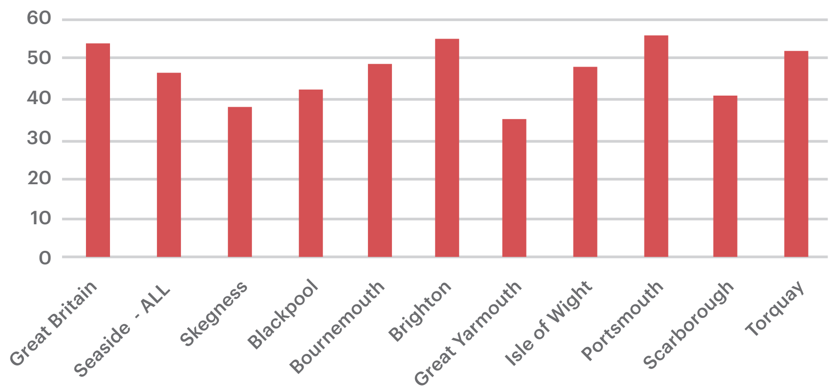
THE LINCOLNSHIRE COAST IS THE MOST SEASONAL IN ENGLAND

A key outcome of this research project was to determine how seasonal the Lincolnshire Coast is and to what extent seasonality is impacted by or impacts on aspiration and investment in skills and training.

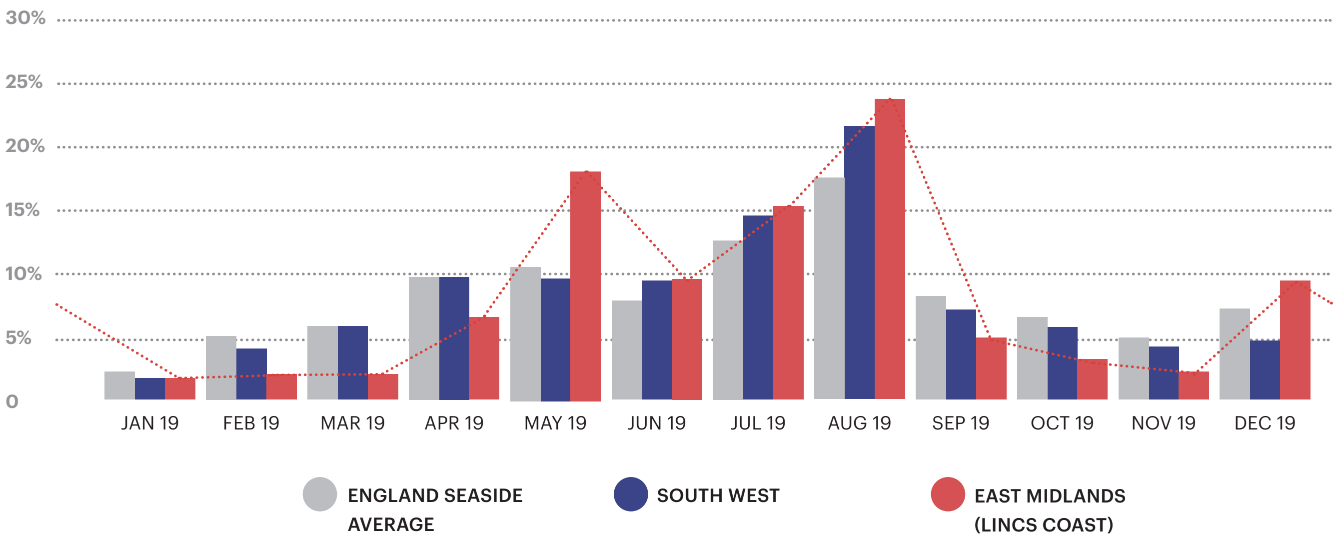
In terms of overnight domestic visitors to the coast, **the Lincolnshire Coast is the most seasonal in England**[2]. **94% of domestic overnight spend on the Lincolnshire coast occurs between March-October**, 44% in July and August alone. The England coastal average is 84% between March – October, 37% in July and August and the next closest region is the South West, with 87% between March-October, 41% in July and August.

VisitEngland national consumer perception research showed that Skegness is perceived as one of the most seasonal places in the UK, alongside Great Yarmouth.[3]

VISIT ENGLAND DESTINATION REPORTS - DESTINATION PERCEPTION - GB HOLIDAY MAKERS FOR ALL SEASONS



OVERNIGHT DOMESTIC VISITOR SPEND FOR SEASIDE DESTINATION[1]

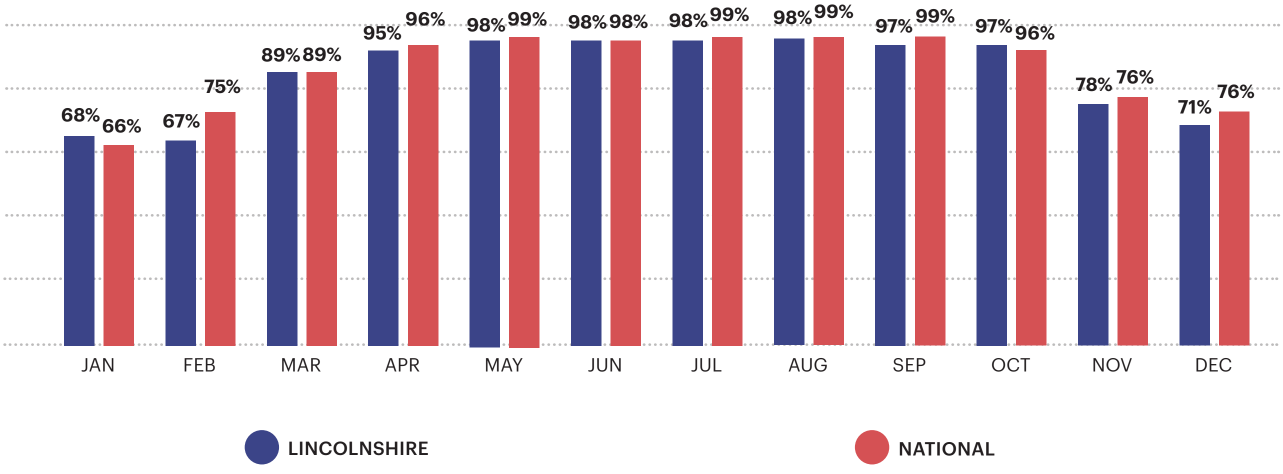


2 GBTS 2019 Volume and Value of seaside visits by region and month

3 VisitEngland Destination reports 2018 – Skegness, Blackpool, Bournemouth, Brighton, Great Yarmouth, Isle of Wight, Portsmouth, Scarborough, Torquay

WHICH MONTHS OF THE YEAR IS YOUR BUSINESS NORMALLY OPEN (IN A NORMAL TRADING YEAR)?

Seasonality – 66% open year round



The business survey results showed that **only two-thirds of businesses are open year-round** on the Lincolnshire Coast. Whilst the majority of seasonal businesses would be interested in opening for more months of the year, there is still a significant 38% of seasonal businesses who don't want to open for more months.

Revenue distribution on the Lincolnshire Coast is very similar to the national coastal average with 38% of businesses taking more than half their annual turnover in July and August – this is largely impacted by the rates charged across coastal areas and does not reflect the profit of the business.

Businesses on the Lincolnshire Coast state that the most dominant internal barrier to business growth is seasonality (59%), followed by their ability to access funding (34%) and staff (27%).

The most dominant external factor influencing business on the Lincolnshire Coast is also seasonality (43%) followed by supply costs (40%) and then wider supply chain issues.

Residents on the Lincolnshire Coast also recognise the extreme seasonality of the destination, scoring it 75/100 (where 100 marks extremely seasonal and 0 not seasonal at all). Residents also showed a strong agreement with the statement "It's hard to find year-round employment" (61% net agreement).

HOW SEASONAL?

For the Lincolnshire Coast, seasonality is therefore a critical barrier to business growth and its seasonality is recognised by residents, visitors and businesses.

UNDERSTANDING THE KEY ISSUES

This report considers which issues are unique to the Lincolnshire Coast, and which are more widespread coastal or visitor economy issues.

The skills and training issues experienced are broadly in line with other coastal areas and with other parts of the country more generally, the impact of seasonality on these issues presents a unique local challenge where the opportunity to deliver training and skills programmes focused on the visitor economy is limited each year to a brief window at the start of the season.

There are opportunities to increase engagement amongst the willing businesses and residents by making it easier to understand what is available, when it is available and providing clear benefits to sending staff on that training.

The aspirations of residents on the Lincolnshire Coast do not seem to be low compared to other coastal areas but the 1-2-1 discussions with businesses demonstrated it is not a lack of ambition but, in fact, a frustration at the lack of coordination, leadership and joined up working to tackle some of the bigger issues such as seasonality.

The Lincolnshire Coast is the most seasonal region for domestic overnight visits in the UK, this gap appears to be widening and is hindering business development. Only limited gains can be made to improving skills and business growth unless seasonality is also tackled. A joined up approach to addressing seasonality should be a priority for all stakeholders.

Finally, it is important to understand that we are still in a delicate position post-Covid-19. Businesses have been struggling to survive for the last two years, investment in businesses has dropped and more than half of businesses on the Lincolnshire Coast have not yet returned to a break-even situation. Whilst this is very much in line with the national coastal visitor economy picture, it means that stakeholders should be sensitive to pressures placed on businesses.

"I WON'T INVEST IN STAFF THAT ONLY WORK FOR ME FOR A FEW MONTHS AND DON'T COME BACK NEXT YEAR"

"COST OF TRAVEL AND STAFF TIME IS TOO MUCH IF THE BENEFIT TO THE BUSINESS IS NOT CLEAR ENOUGH"

"LACK OF COMMUNICATION, LEADS TO LACK OF CONFIDENCE, LEADS TO LACK OF INVESTMENT"

"BUSINESSES NEED TO SEE LEADERSHIP AND SUPPORT"

"BUSINESSES NEED TO UNDERSTAND THE BIGGER PICTURE BEFORE THEY WILL INVEST"

"CAN'T FORCE SKILLS DEVELOPMENT IF THE ENVIRONMENT ISN'T RIGHT... MUST MAKE GAINS ON SEASONALITY BEFORE YOU CAN EXPECT TO SEE SIGNIFICANT CHANGE"

"BUSINESSES ARE STILL IN SURVIVAL MODE, THERE ISN'T CONFIDENCE TO INVEST"

THE SKILLS OPPORTUNITY

In a post-Brexit and Levelling Up context, there is now a real opportunity for greater local influence on skills policy and delivery to enable support to be tailored to the needs of the local community and economy. This would enable areas to provide more flexibility in course programmes to meet seasonality challenges, to build in the time to support unemployed back into work and help more people through the process, delivering life-long change in attitudes to learning and measure change in metrics that make sense for the local conditions.

THE OPPORTUNITY

PRE-COVID, THE COASTAL VISITOR ECONOMY ON THE LINCOLNSHIRE COAST GENERATED £543M OF VISITOR SPEND TO THE ECONOMY, WELCOMED MORE THAN 2.9 MILLION VISITORS, AND SUPPORTED 6,435 FTE JOBS

During 2020-21 we saw **a renewed domestic consumer interest in the coast**, spending time outdoors and UK holidays.

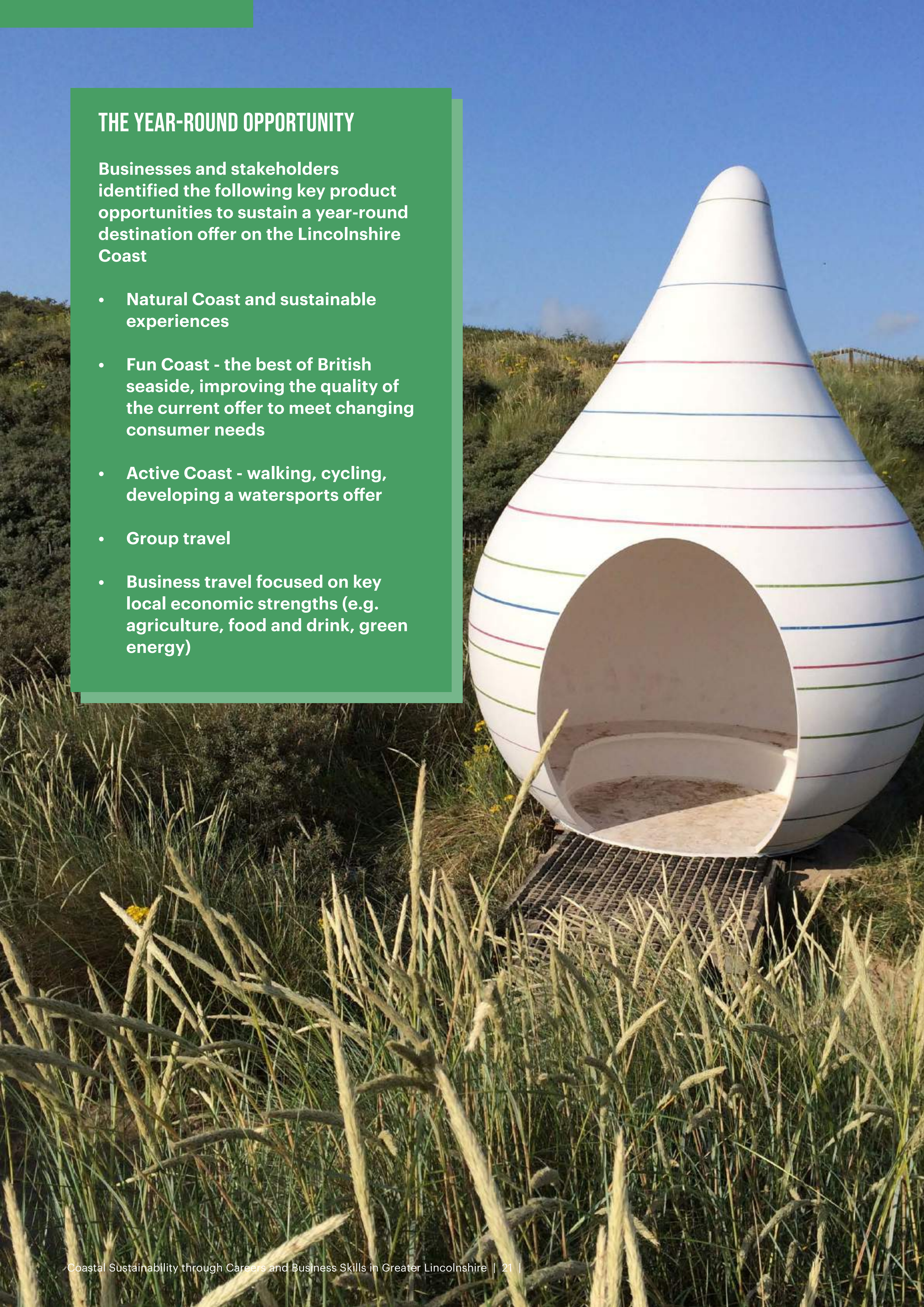
- 74% of consumers state they want to visit the UK coast in 2022, though not necessarily for their main holiday
- 64% of consumers say they are more likely to take a UK break to reduce their carbon footprint
- Some businesses on the Lincolnshire Coast stated that they had their best summer ever in 2021
- Businesses in Lincolnshire reported new audiences coming in 2021 and re-booking for off-peak breaks for 2022

EQUIVALENT LESS SEASONAL ECONOMY COULD BE WORTH £660M

Alongside this renewed consumer interest, the next few years will see a significant increase in public investment across the Lincolnshire Coast as a result of the **Connected Coast Towns Fund** investment and the development of the new **England Coast Path National Trail** which will run the full length of the English coastline and is due to be completed by 2023. Much of this investment will directly or indirectly benefit the visitor economy across the region.

Through the 1-2-1 business conversations, stakeholder's discussions and workshops, the NCTA witnessed a real **appetite for change in businesses and stakeholders** seeing 2022 as a unique window of opportunity post Covid-19 and, coupled with the significant new investment, the chance to tackle seasonality and deliver real collective change for the Lincolnshire coastal visitor economy.

Finally, there is a unique opportunity in the post-Brexit environment, not least through the new national government **Levelling Up agenda** to provide more localised leadership and investment and the delivery of skills, education and business policies, which will benefit the Lincolnshire coast. Recognising which issues are unique to the Lincolnshire coast and where stakeholders should work in collaboration with other coastal areas to create policy change is a key next step if the Lincolnshire Coast is to benefit from the current opportunity in changes to central Government policy and delivery.



THE YEAR-ROUND OPPORTUNITY

Businesses and stakeholders identified the following key product opportunities to sustain a year-round destination offer on the Lincolnshire Coast

- **Natural Coast and sustainable experiences**
- **Fun Coast - the best of British seaside, improving the quality of the current offer to meet changing consumer needs**
- **Active Coast - walking, cycling, developing a watersports offer**
- **Group travel**
- **Business travel focused on key local economic strengths (e.g. agriculture, food and drink, green energy)**

SUMMARY

THE VISITOR ECONOMY ON THE LINCOLNSHIRE COAST PRE-COVID GENERATED A VISITOR SPEND OF £543M HOSTING 2.9 MILLION VISITORS AND SUPPORTING 6,435 FTE JOBS.

The Coastal Sustainability through Careers and Business Skills research report sought to deepen understanding of the three key issues of Seasonality, Aspiration and Investment in Skills on the Lincolnshire Coast in order to establish which, if any, were impacting on engagement in skills and training initiatives. The research also sought to determine whether the Lincolnshire coast was unique or experiencing similar issues to other coastal locations.

Using a mix of primary and secondary data the research identified:

SEASONALITY

The Lincolnshire Coast is the most seasonal coast in England for domestic overnight visits which is the primary and dominant factor impacting on skills and investment.

INVESTMENT & SKILLS

Barriers to engagement in funded skills and training initiatives on the Lincolnshire Coast are the same as those expressed in rural and coastal economies across England. However, these barriers are exaggerated by the extreme seasonal nature of the visitor economy here. Whilst some changes to the delivery of skills programmes should increase engagement, only limited gains can be made without tackling seasonality.

ASPIRATION

Aspiration of the residents and businesses on the Lincolnshire Coast is not lower than other coastal communities. The perceived lower aspiration is actually a lack of confidence and a frustration caused by the highly seasonal nature of the visitor economy and lack of vision to address that seasonality.

The research identified that aspiration was not a key issue on the Lincolnshire coast and that there are significant opportunities to increase engagement in skills and training initiatives by targeting support on the willing and making it easier for businesses and residents to understand what is available and by providing clear benefits to engagement.

It is felt though, that only limited gains can be made in improving skills across the visitor economy on the Lincolnshire coast if seasonality is not improved. The Lincolnshire coast is the most seasonal in England, and this is affecting the engagement and investment in people and skills.

Post Covid-19 there is a renewed interest in the coastal staycations, with new audiences visiting the Lincolnshire coast and experiencing its potential for shoulder and off-peak breaks. A less seasonal visitor economy on the Lincolnshire Coast working within the current operating structure could generate a visitor spend of £660m per year by focusing on the natural coast, active coast and best of seaside offer.

Working collaboratively across all key stakeholders will be key to delivering change in skills and seasonality. As we emerge from the pandemic, alongside the opportunity for change in the post-Brexit economy with the Government's Levelling Up agenda, and with the significant new investment on the Lincolnshire Coast from the Connected Coast Towns Fund there is a unique opportunity to deliver change.

Recommendations and next steps have been provided to funding partners to aid discussions on the way forward in addressing these issues.

THIS IS A KEY POSITIVE OPPORTUNITY TO WORK COLLABORATIVELY ACROSS ALL STAKEHOLDERS ON THE LINCOLNSHIRE COAST TO TACKLE SEASONALITY AND MAKE SIGNIFICANT IMPROVEMENTS IN SKILLS.

Coastal Communities Fund

national coastal tourism academy

Research prepared by the
National Coastal Tourism Academy
coastaltourismacademy.co.uk

June 2022

APPENDIX

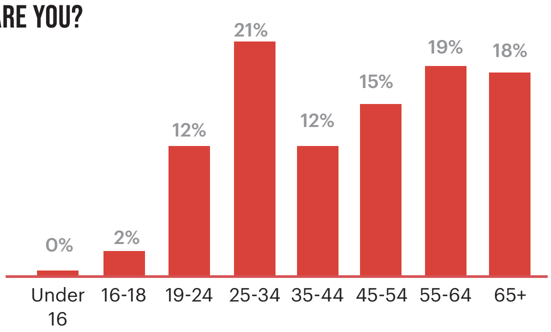
VINTAGE FUN FAIR
THESE ATTRACTIONS ARE AVAILABLE FOR HIRE WORLDWIDE. FESTIVALS, EVENTS AND FILM WORK. ALL ENQUIRIES PLEASE TEL: 07814 344836 OR EMAIL henrychipperfield@gmail.com
VINTAGE FUN FAIR
BIG WHEEL

APPENDIX A:

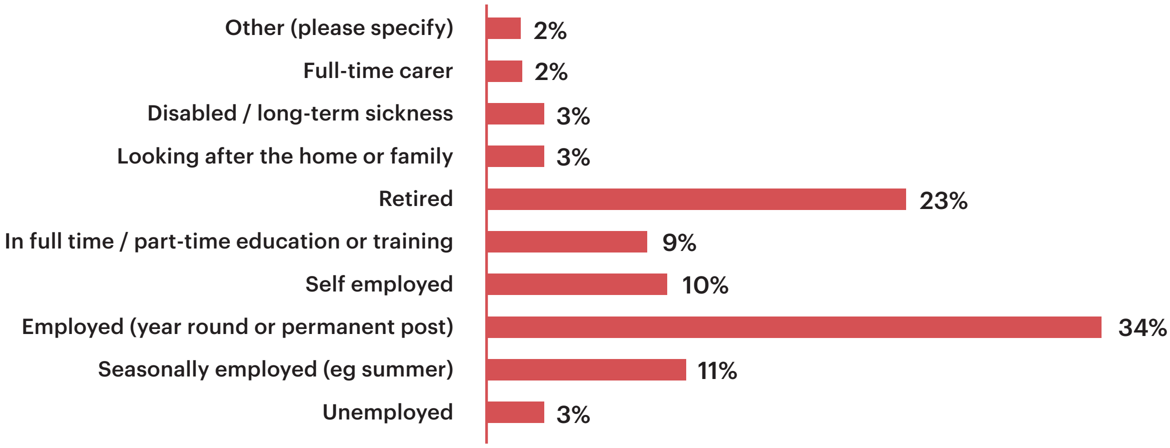
LINCOLNSHIRE RESIDENT SURVEY - RESULTS

COASTAL LOCATIONS

HOW OLD ARE YOU?



HOW WOULD YOU DESCRIBE YOUR WORKING STATUS?



THOSE EMPLOYED ARE WORKING IN A RANGE OF SECTORS – 21% IN VISITOR ECONOMY BUSINESSES (73 RESPONSES)

10%	Accommodation (Hotel, B&B, Campsite, Holiday Park etc)
1%	Hospitality, Events, Food and Drink venue (Pub, Restaurant, Cafe etc)
2%	Visitor attraction, Leisure, activity provider or Entertainment venue (incl. arcades, theatres)
8%	Retail and Sales
6%	Health and Social Care
3%	Energy and Utilities
2%	Law, Accountancy, Banking and Finance
11%	Charity and voluntary work
9%	Cultural, Creative arts and design
2%	IT, Engineering and Manufacturing
5%	Environment and Agriculture
23%	Education, training or skills provider
7%	Public sector
3%	Property and Construction
3%	Marketing, media and PR
1%	Transport and Logistics
5%	Other (please specify)

QUALFICATION LEVELS FOR RESPONDENTS:

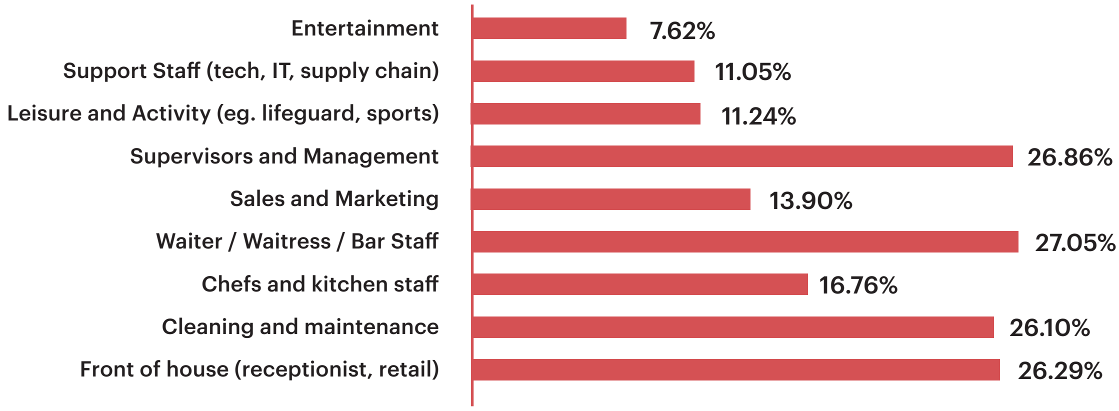
	All	Visitor Economy	Under 35s
No formal qualifications	12%	15%	21%
Entry Level	7%	8%	20%
GCSEs or other level 1 & 2 qualifications	22%	23%	20%
A-level or other level 3 qualifications	23%	26%	23%
Degree, HND, HNC or other level 4,5,6 qualifications	31%	26%	14%
PhD, Masters or other level 7 & 8 Qualifications	5%	1.4%	-

Q7. Have you ever worked in the Visitor Economy (Accommodation, Attractions, Hospitality, Entertainment, Leisure, Events or Retail)?

66.2% YES (rising to 93% of under 35s)

WHAT TYPE OF ROLES WITHIN THE VISITOR ECONOMY HAVE YOU WORKED IN?

N.B OTHER = ADMIN AND EVENTS



OPINIONS OF THE VISITOR ECONOMY:

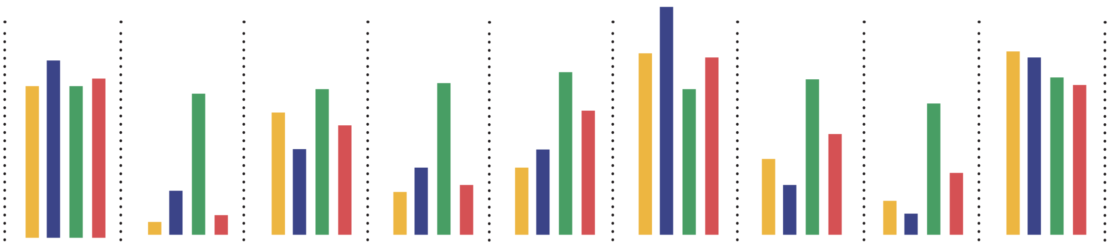
61% of all respondents have net agreement to the perception that the Visitor Economy is "seasonal work" and has "lots of entry level positions"

49% have net agreement that it's a "fun and vibrant" industry and 41% "easy to find employment"

Therefore the perception is less seasonal than those working in it feel it is.

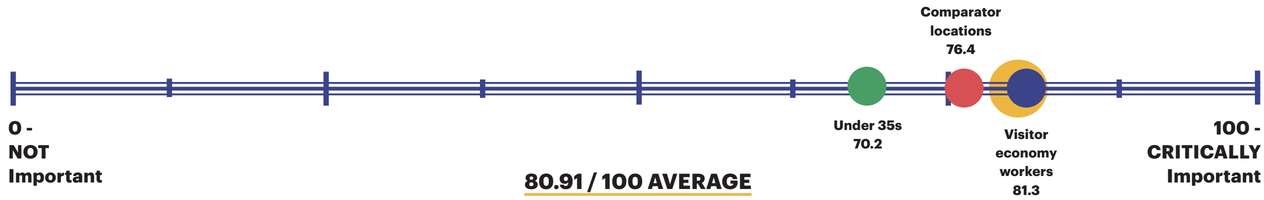
Reality is more fun and vibrant than perception, less flexible and not as good a work-life balance.

NET AGREEMENT OF OPINIONS OF THE VISITOR ECONOMY



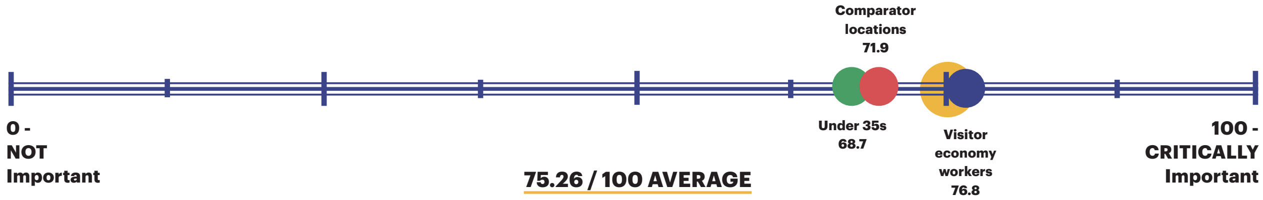
	Fun and vibrant industry	Good pay and rewards	Easy to find employment	Great progression and career opportunities	Good opportunities for training and skills development	Seasonal Work	Flexible hours	Good work-life balance	Lots of entry level positions (no need for formal qualificatoins)
All Residents	49%	5%	41%	15%	23%	61%	25%	12%	61%
Visitor economy workers	58%	14%	29%	23%	29%	77%	17%	7%	59%
Under 35s	50%	48%	49%	51%	55%	49%	52%	45%	53%
Comparator locations	52%	8%	37%	18%	42%	60%	35%	21%	50%

HOW IMPORTANT IS THE VISITOR ECONOMY TO THE LINCOLNSHIRE COAST?



80.91 / 100 AVERAGE for Lincolnshire residents

HOW SEASONAL?

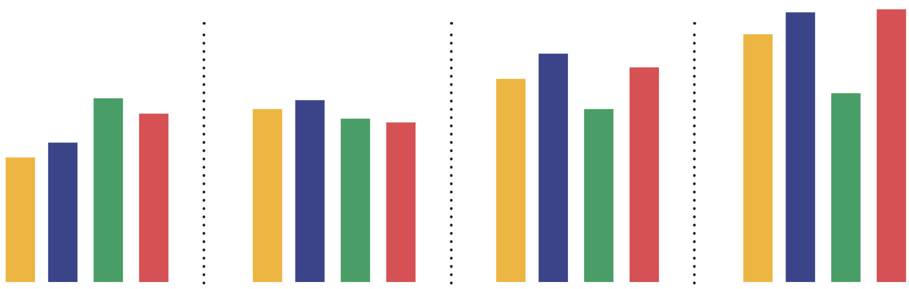


75.26 / 100 AVERAGE for Lincolnshire residents

ATTITUDES TO THE VISITOR ECONOMY:

There is recognition of the importance of the visitor economy to the wider economy, that it provides opportunities for work, but the majority of residents recognise it's hard to find year round employment and the benefits in entertainment and leisure facilities are not especially attributed to the visitor economy – this was notably lower than the opinions of residents in the comparator locations.

NET AGREEMENT WITH FOLLOWING STATEMENTS ABOUT THE VISITOR ECONOMY



	We have more and better leisure and entertainment facilities because of the visitor economy	It's hard to find year round employment	The visitor economy provides lots of opportunities to work	We need visitors to support our economy
All Residents	39%	55%	64%	79%
Visitor economy workers	44%	57%	72%	85%
Under 35s	58%	51%	55%	60%
Comparator locations	53%	51%	68%	86%

HOW WOULD YOU DESCRIBE YOURSELF?

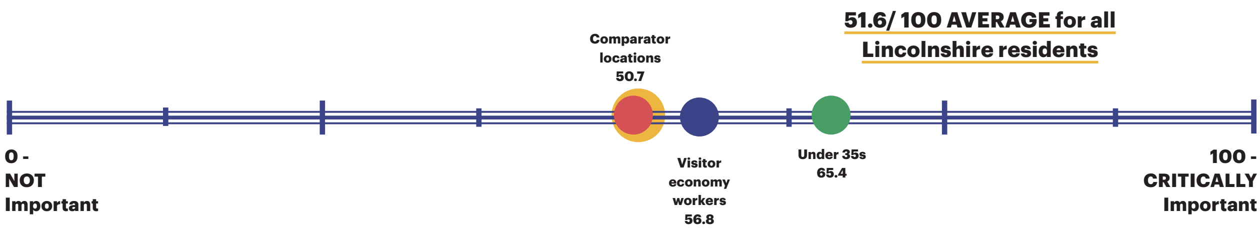
	All	Visitor Economy	Under 35s	Comparator Locations
I am content with my current skills level	34%	57%	36%	39%
I am keen to develop and learn new skills relevant to my current job	38%	48%	61%	34%
I am keen to develop and learn new skills in a different field	28%	37%	43%	21%
My main priority is paying my bills, providing for myself/ family	32%	35%	42%	30%
I work purely to support outside goals (e.g. studying for another career)	13%	15%	23%	3%
I am keen to find work that is fulfilling and rewarding	18%	20%	21%	17%
I am unable to work	6%	5%	7%	5%
I am retired	21%	0%	1%	15%
Not sure	1%	2%	1%	1%
Other	3%	2%	0%	0%

DO YOU FEEL THE FOLLOWING SUPPORT THOSE LOOKING TO DEVELOP THEIR SKILLS AND TRAINING?

Visitor economy workers in red boxes

	Completely Support	Somewhat Support	Unsure	Do Not Support
Local employers / Your employer (if relevant)	15%	38%	29%	10%
Local employers / Your employer (if relevant)	25%	45%	20%	11%
Local training services	17%	35%	32%	9%
Local training services	23%	46%	26%	5%

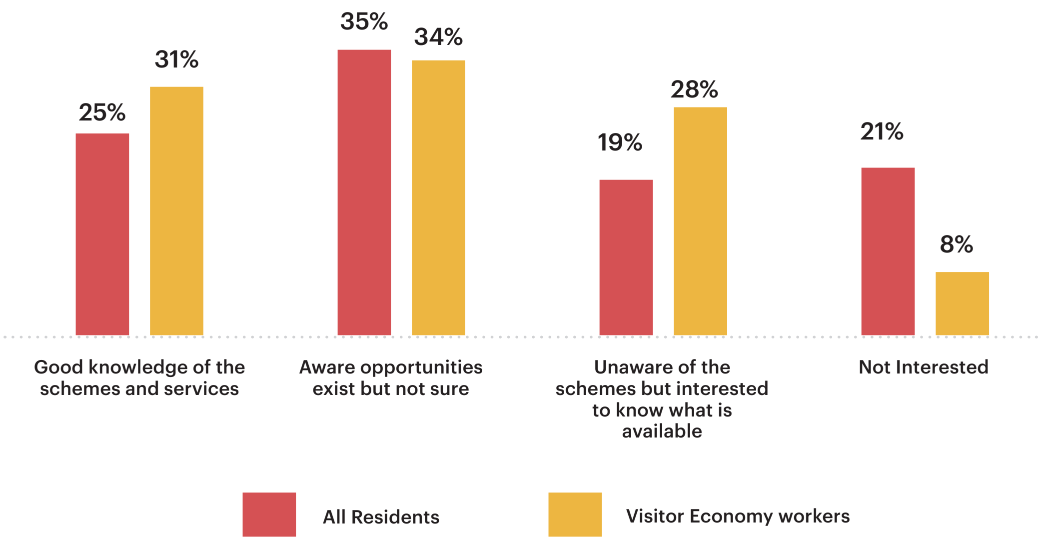
DO YOU FEEL THE LINCOLNSHIRE COASTAL AREA CAN MEET THE NEEDS OF THOSE LOOKING TO DEVELOP THEIR SKILLS OR CAREER?



USE OF TRAINING SCHEMES IN LAST THREE YEARS?

	All Lincs Residents	Visitor Economy Workers	Under 35s	Comparator Locations
Apprenticeships	19%	28%	21%	20%
Back to work / Job Centre Plus schemes	19%	23%	38%	6%
CareerNet	14%	13%	34%	2%
Kickstart Scheme	14%	6%	34%	5%
Locally funded schemes (e.g. Local Authority / LEP / CCF)	19%	14%	36%	1%
Skills Support for the Workforce	14%	19%	34%	5%
Traineeships	10%	11%	11%	2%
T Levels	4%	6%	6%	1%
Unsure	9%	8%	5%	12%
None of the above	40%	34%	6%	53%
Other	4%	0%	0%	2%

HOW AWARE ARE YOU OF LOCAL SKILLS AND TRAINING OPPORTUNITIES AVAILABLE TO YOU?



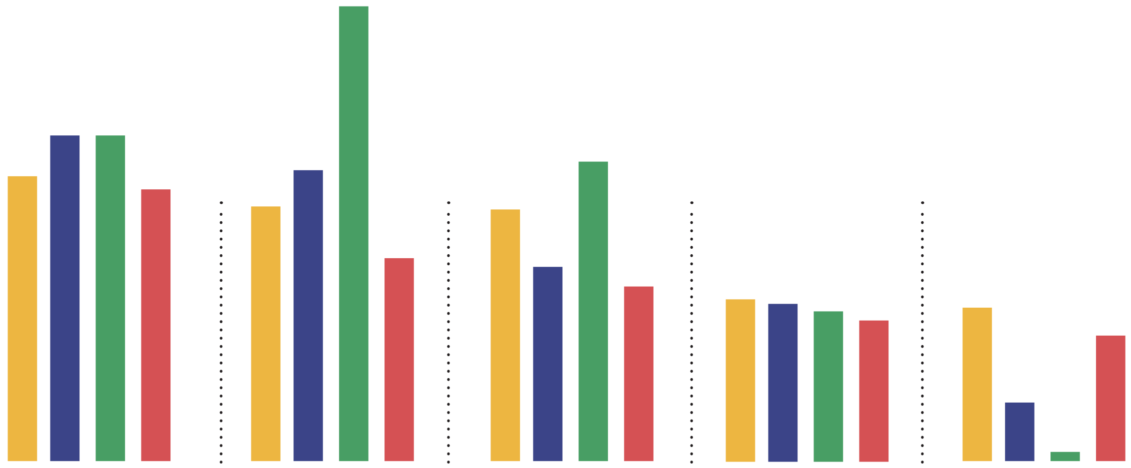
ARE THERE ANY CONCERNS OR CHALLENGES THAT MAY IMPACT ON YOUR USE OF FUNDED SKILLS AND TRAINING SCHEMES?

	All %	Visitor Economy Workers	Under 35s	Comparator Locations
There's a lack of flexibility in programmes to match my needs	14%	26%	20%	11%
I'm concerned about timing of the programmes (time of day, day of week)	18%	25%	21%	12%
Cost of attending isn't covered by funding (transport, food, equipment etc)	16%	22%	17%	17%
I'm worried any schemes may clash with other commitments	15%	22%	21%	16%
I'm worried it's not really free or will be encouraged to pay more for extra activities	16%	22%	19%	17%
I don't know how to find out what is available	13%	18%	12%	16%
I'm concerned about how to get to any training (access to transport)	14%	17%	19%	14%
I'm concerned about the length of programme and required commitment	14%	17%	21%	17%
My confidence to attend and participate	12%	17%	16%	15%
I feel self-conscious when on training courses	9%	15%	11%	12%
I'm worried about level of support from employer	8%	12%	10%	8%
I'm worried I won't be able to complete the training	11%	12%	21%	10%
My ability to commit in advance to participation	9%	9%	14%	12%
I don't have the equipment (e.g. Laptop) to find opportunities and apply	9%	6%	13%	6%
I'm worried about level of support from friends & family	8%	6%	13%	3%
I'm worried about completing registration and other paperwork	10%	5%	17%	7%

HOW WOULD YOU DESCRIBE YOUR CONFIDENCE AT WORK?

	All Residents	Visitor Economy Workers	Under 35s	Comparator Locations
Extremely confident of what is / would be expected of me	37%	40%	27%	28%
Quite confident	37%	45%	46%	40%
Somewhat confident	17%	11%	23%	19%
Not so confident	5%	5%	3%	7%
Not at all confident	3%	0%	1%	5%

WHICH OF THE FOLLOWING MOST CLOSELY MATCHES YOUR THOUGHTS ON TRAINING?



	I actively look / would look for suitable training and development opportunities	I trust my employer to identify training and development opportunities	I would ask for support for any training needed to complete my job	I would complete any training my employer asked me to, revelant to my job	I am not interested in any further training or development
All Residents	37%	32%	32%	21%	20%
Visitor economy workers	42%	37%	25%	20%	8%
Under 35s	41%	58%	38%	19%	1%
Comparator locations	35%	26%	22%	18%	16%

WHAT ARE YOUR THOUGHTS ON WHEN TRAINING SHOULD BE CARRIED OUT?

	All	Visitor Economy	Under 35s	Comparator Locations
I expect any training to be undertaken within my paid working hours	37%	49%	21%	48%
I am willing to undertake training outside my normal working hours if I get paid or the time back	46%	37%	63%	33%
I am happy to undertake training at any time (subject to notice)	17%	11%	7%	17%

APPENDIX B:

BUSINESS SURVEY RESULTS

Lincolnshire survey 63 responses - 89% independently owned

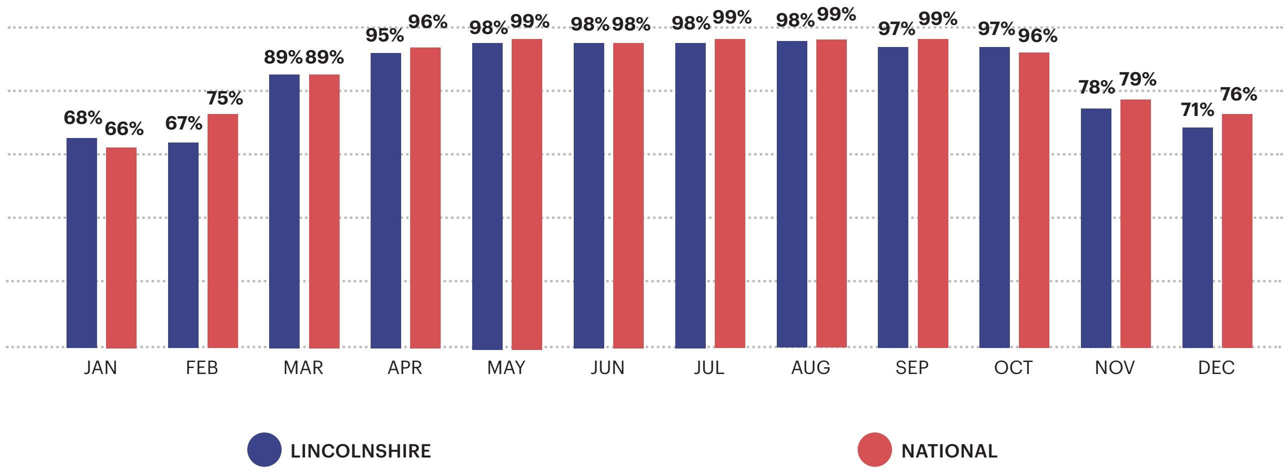
Self-employed/sole trader	38%
Micro business (1-10 employees)	29%
Small business (11-50 employees)	22%
Medium sized business (51-250 employees)	5%
Large business (250+ employees)	6%

WHICH TOURISM AND HOSPITALITY SECTOR DOES YOUR MAIN BUSINESS PRINCIPALLY OPERATE IN?

Serviced accommodation (Hotels, guest houses, B&B)	8%
Non-serviced accommodation (self-catering, caravan and camping)	29%
Restaurant, cafe, takeaway	13%
Bar, public house, night club	3%
Visitor attraction or activity	14%
International Education	0%
Transport	2%
Retail	14%
Marketing and promotion	5%
Events, meetings and conference venue	2%
Arts and Culture	0%
Leisure, Sports and Activity	3%
Travel Agent	0%
Supplier (e.g. linen, catering)	3%
Other (please specify)	5%

WHICH MONTHS OF THE YEAR IS YOUR BUSINESS NORMALLY OPEN (IN A NORMAL TRADING YEAR)?

Seasonality – 66% open year round



WOULD YOU BE INTERESTED IN EXPANDING YOUR BUSINESS TO OPEN FOR MORE MONTHS OF THE YEAR?

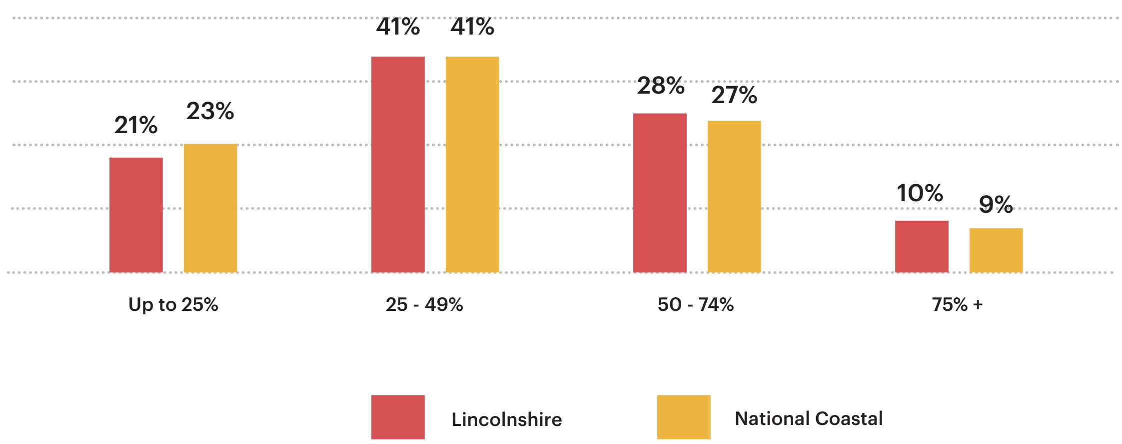
Answered by businesses that are not open year-round

Note – sample very small for this question, results to be used with caution

Yes	48%
No	38%
Don't know	14%

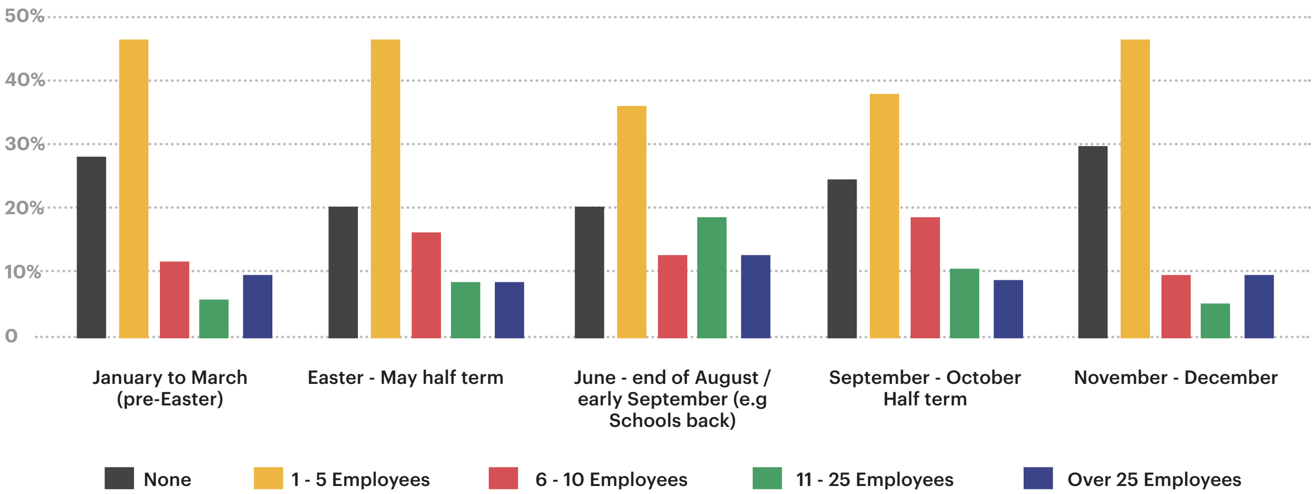
WHAT PERCENTAGE OF YOUR BUSINESS TURNOVER IS GENERATED IN JULY AND AUGUST?

Seasonal turnover similar to national average 38% taking more than half their turnover in July and August



HOW MANY STAFF (ACTUAL EMPLOYEES) DO YOU HAVE AT DIFFERENT TIMES OF THE YEAR? (INCLUDE PART TIME, SEASONAL AND FULL TIME STAFF)

Most employee changes are concentrated on peak summer but there is a more stepped approach, nationally businesses tend to make one seasonal step per year not gradually increase and decrease staff as seen in the Lincolnshire results



WHAT PERCENTAGE OF STAFF ARE PART-TIME:

A fifth of businesses have majority of their workforce part-time

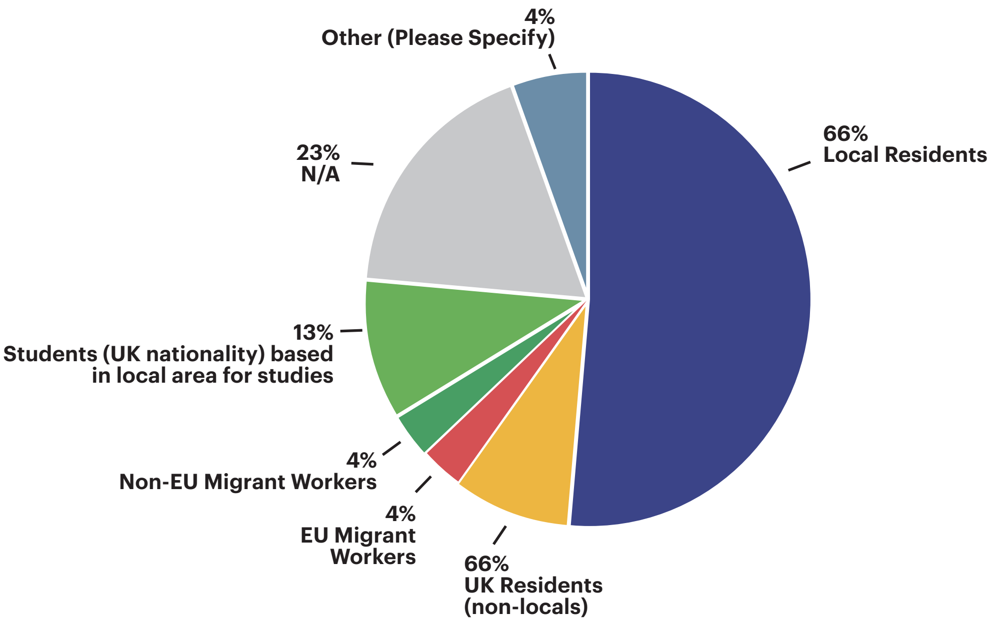
None	35%
Up to 25%	13%
25-49%	19%
50-74%	10%
Over 75%	21%

HOW ARE YOUR STAFF EMPLOYMENT LEVELS COMPARED TO LAST YEAR?

Staffing levels increased by more than 25%	7%
Staffing levels increased by up to 25%	21%
Staffing levels not changed	25%
Staffing levels decreased by up to 25%	18%
Staffing levels decreased by more than 25%	7%
Non-applicable / Self-employed	21%

WHERE DO THE MAJORITY OF YOUR EMPLOYED SEASONAL STAFF COME FROM? (STAFF EMPLOYED FOR PART OF THE YEAR E.G. MARCH TO OCTOBER)

Seasonal staff are predominantly local residents



HOW WOULD YOU DESCRIBE YOUR RECRUITMENT OF STAFF THIS YEAR (2021)?

Recruitment this year: half of businesses had some issues

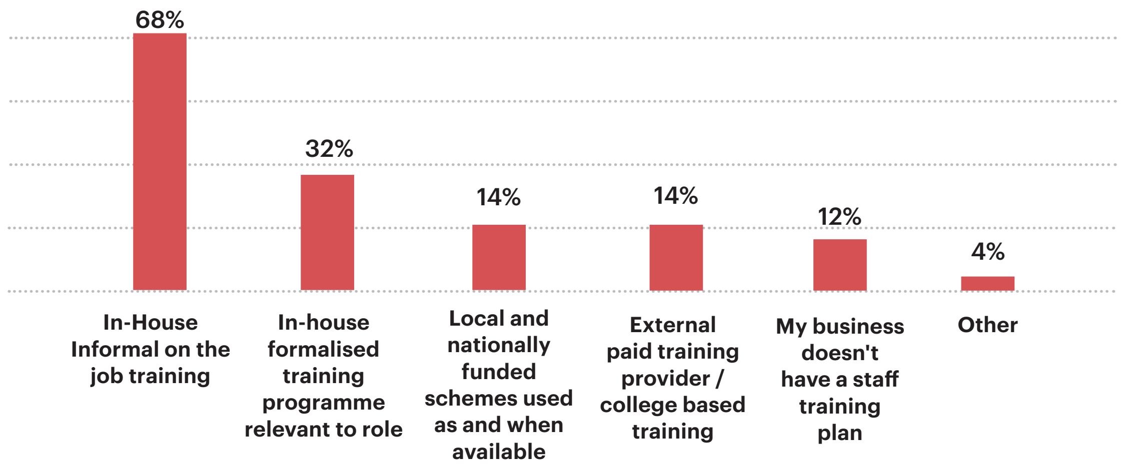
No issues encountered	22%
Challenges filling certain types of roles (e.g. Chefs)	27%
Challenges filling seasonal vacancies	35%
Challenges filling permanent year-round vacancies	16%
N/A	22%
Other (please specify)	2%

WHICH ROLES ARE YOU STRUGGLING TO RECRUIT:

Front of house (e.g. receptionist)	20%
Cleaning and maintenance (incl ground maintenance)	40%
Qualified chefs	30%
Kitchen staff	33%
Waiter/ Waitress / Bar staff	53%
Sales and Marketing	7%
Supervisors and Management	13%
Leisure and Activity (e.g. lifeguards, instructors)	10%
Entertainment	3%
N/A	10%
Other (please specify)	10%

TRAINING

HOW WOULD YOU DESCRIBE YOUR STAFF TRAINING?



WHICH OF THE FOLLOWING EMPLOYMENT AND SKILLS SCHEMES HAVE YOU BEEN INVOLVED WITH?

Relatively low engagement in government schemes - those that have engaged tend to be visitor attractions or larger organisations

Apprenticeships	14%
Back to Work / Job Centre plus schemes	5%
CareerNet	2%
Kickstart Scheme	14%
Locally funded schemes (e.g. Local Authority / LEP / CCF)	6%
Skills Support for the Workforce	3%
Traineeships	2%
T Levels	0%

WHAT BARRIERS, IF ANY, IMPACT YOUR USE OF FUNDED SKILLS AND TRAINING SCHEMES?

Those that have engaged with government funded schemes have different barriers - more about flexibility of schemes, timing and costs

Finding out what is available	35%
Understanding what my business is eligible for	37%
Completing registration and other paperwork	13%
Timing of the programmes (time of day, day of week)	9%
Timing of programmes (times of year)	13%
Length of the programmes	4%
Cost of staff time to attend	17%
Schemes clash with busy times in business	17%
Lack of flexibility in programmes to match your business needs	22%
Ability to commit in advance to participation	13%
Additional costs not covered by the funding (e.g. travel, expenses)	13%
Other (please specify)	33%

WHICH OF THE FOLLOWING AREAS OF TRAINING OR BUSINESS SUPPORT WOULD YOU LIKE TO HAVE ACCESS TO?

Targeting new audiences	22%
Customer Service	21%
Increasing repeat visits and upselling	21%
Extending the season / year round products	17%
Improving online digital presence (e.g. website /social media)	16%
Supervisor / Management training	13%
Improving green / sustainability credentials	13%
Understanding tourism trends and performance	11%
Other (please specify)	11%
Best practice from other similar businesses	10%
Developing new products	8%
Revenue management (flexible pricing)	8%
1-2-1 advice on improving my business	8%
Understanding accessibility needs	6%
Coaching / mentoring staff or management	6%
Regulation / Mandatory training	5%

WHICH AREAS OF DIGITAL SUPPORT WOULD YOU BE INTERESTED IN:

Developing digital marketing strategy / advertising campaigns	25%
How to use data effectively to target new customers and improve performance	24%
Improving social media presence and performance	19%
Creating a website	14%
Other (please specify)	13%
Adding online booking to my website	11%
Improving use of technology in day-to-day operations (e-check-in, food ordering etc)	10%
Implementing revenue management (variable pricing)	3%

HOW WOULD YOU DESCRIBE YOUR PERSONAL DEVELOPMENT ASPIRATIONS?

I am content with my current skills and development	39%
I am keen to develop and learn new skills relevant to this business	52%
I am keen to develop and learn new skills in a different field	11%
I work in this role purely to support outside goals (e.g. studying for another career)	4%

IF APPLICABLE, HOW WOULD YOU DESCRIBE YOUR STAFF'S ATTITUDES TO PERSONAL DEVELOPMENT?

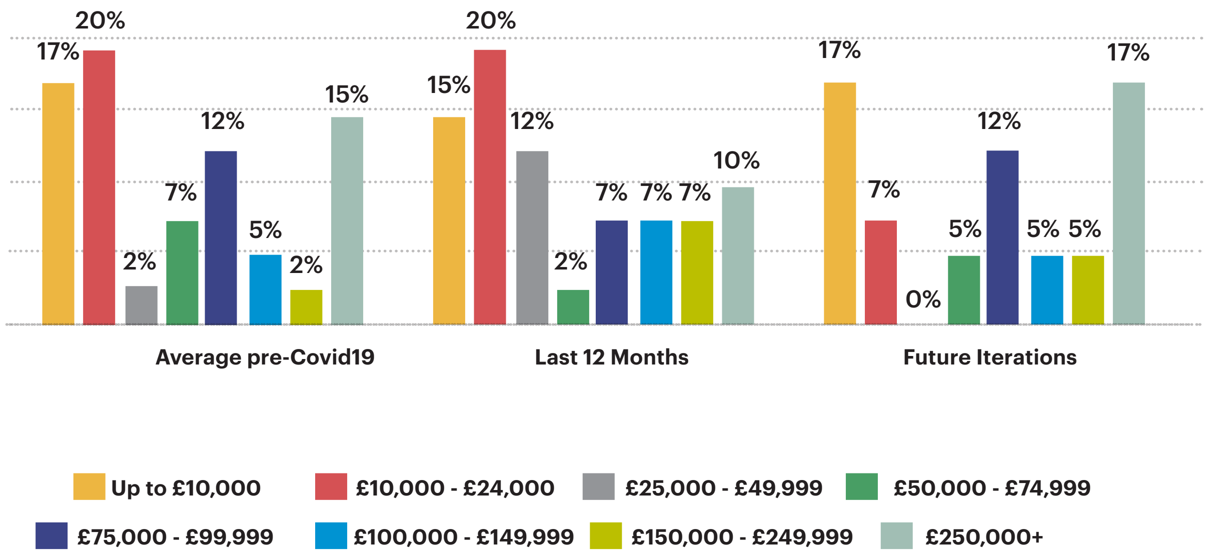
	Business results	VE workers in resident survey
My staff are content with their current skills and development	17%	57%
My staff are keen to develop and learn new skills relevant to this business	43%	48%
My staff are keen to develop and learn new skills in a different field	13%	37%
My staff work in this role purely to support outside goals (e.g. studying for another career)	11%	35%
N/A	26%	

Manager / owner aspirations were similar to the results of all residents in the resident survey – but their perception of their staff was vastly different to the responses in the resident survey of those that stated they currently work in the visitor economy

To help us understand the impact of Covid-19, please estimate your average annual investment in your business - before Covid-19 and in the last 12 months and expectations for the future

(Investment includes ad-hoc spend or cash injection e.g. new furniture, products, capital projects, new IT developments)

There was a dip in investment in last 12 months but expected to return to pre-pandemic levels in future and results are similar with national sample



WHAT BARRIERS, IF ANY, IMPACT THE GROWTH OF YOUR BUSINESS?

Seasonality is the most dominant barrier to growth – followed by access to funding and staff – VAT threshold cited by 17%

Seasonality of the destination	59%
Access to funding and finance	34%
Access to trained / experienced staff	27%
Access to work ready candidates	22%
VAT threshold	17%
Other (please specify)	15%
Number of competing businesses locally	7%
Access to training and skills programmes	7%
None	5%

IN TERMS OF YOUR PLANS FOR THE FUTURE, WHICH OF THE FOLLOWING BEST DESCRIBES YOUR ATTITUDE TOWARDS YOUR BUSINESS?

Attitudes to growth are much higher than other coastal areas looking to grow

	Lincs	National
I am establishing a new business	5%	5%
I am trying to recover to pre-Covid levels and then am content with my operating business level	3%	13%
I am content with my current business level	8%	17%
I am trying to grow my business	43%	28%
I am trying to recover then grow my business	25%	21%
I intend to sell/ retire within the next 5 years	13%	12%
Don't know / cannot say	5%	4%

Note the sample size for this question on the Lincolnshire results was smaller than the main sample

WHICH OF THE FOLLOWING, IF ANY, ARE AFFECTING YOUR BUSINESS

External factors influencing business – Seasonality, supplier costs and other supplier issues – similar to national average.

	Lincs	National
Seasonality of the destination	43%	49%
Increasing supplier costs	40%	43%
Other supplier issues (delays, lack of stock, unreliable)	35%	33%
Poor UK economic climate / less money in consumers pockets	28%	32%
Covid-related staffing issues (e.g. cases, self-isolation)	28%	26%
Access to finance to invest	28%	11%
Skills gaps - lack of suitably qualified /experienced staff	25%	14%
Availability of staff to fill vacancies	25%	21%
Changing Covid restrictions	23%	41%
Attracting and retaining customers	23%	17%
Poor / unpredictable weather	20%	40%
Regulations and compliance	20%	16%
Competition from other parts of UK	18%	14%
Cost of finance / interest rates	15%	8%
High staff turnover	13%	8%
Planning	13%	10%
Access to broadband	13%	8%
Lack of training and business support	10%	4%
Competition from other local businesses	5%	17%
Competition from overseas holidays	5%	11%
Employee absence / staff health	5%	6%

HOW IMPORTANT IS MAKING ENVIRONMENTAL, GREEN OR SUSTAINABILITY IMPROVEMENTS TO YOUR BUSINESS AT THE MOMENT?

	Lincs	National
Very important	35%	29%
Important	40%	39%
Unsure	5%	12%
Not important at the moment	13%	16%
Not important at any stage	8%	2%

HOW IMPORTANT IS MAKING YOUR BUSINESS MORE ACCESSIBLE FOR CUSTOMERS WITH A DISABILITY AND ACCESS NEEDS AT THE MOMENT?

	Lincs	National
Very important	38%	17%
Important	28%	26%
Unsure	10%	17%
Not important at the moment	18%	20%
Not important at any stage	3%	9%
Other (please specify)	5%	11%

AT THIS POINT IN TIME, HOW LONG DO YOU ESTIMATE IT WILL TAKE TO RETURN YOUR BUSINESS TO PROFITABILITY

Recovery stages similar to national coastal picture – 48% now back in profit but 36% say it will be more than a year before they're back to break even

Already back to profitable status	48%
Less than 3 months	3%
3-6 months	5%
6 months to a year	10%
1 - 2 years	23%
More than 2 years	13%

HOW IMPORTANT WILL ONGOING GOVERNMENT SUPPORT BE TO ENABLE THE SURVIVAL OF YOUR BUSINESS?

	Lincs	National
Will make a significant difference between survival and collapse	33%	38%
Will make little or no difference	25%	30%
I do not intend to access Government support	13%	24%
My business is unable to access Government support	10%	5%
I am not aware of Government support that I can access	40%	7%

WHAT ADDITIONAL OR CONTINUED SUPPORT WOULD YOU LIKE TO SEE FOR YOUR BUSINESS FROM GOVERNMENT?

	Lincs	National
Retain change to 12.5% VAT	42%	44%
Local Restrictions Support Grants (Rate payers grant)	34%	28%
Small Business Rate Relief (SBRR) and Rural Rate Relief (RRR)	32%	50%
Support to fill staff shortages	21%	17%
Additional Restrictions (Discretionary) Grant	16%	24%
VAT deferral	16%	14%
Bounce Back Loan	16%	11%
Self-Employed Income Support Scheme (SEISS)	13%	16%
Rent Relief from landlords	13%	9%
Investment in addressing skills gaps	13%	8%
Other (please specify)	13%	8%
Coronavirus Job Retention Scheme (CJRS - furlough scheme)	11%	9%
Job Support Scheme	8%	6%
Statutory Sick Pay (SSP)	8%	8%
Time to Pay (TTP)	8%	5%
Coronavirus Business Interruption Loan Scheme (CBILS)	5%	8%
Eat out to help out	5%	4%
Increase Gift Aid percentage	5%	6%

Coastal Communities Fund

national coastal tourism academy

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