Introduction

British Marine is the membership organisation for the UK leisure, superyacht and small commercial marine industry. We have over 1,660 member companies, most of which are small and medium sized businesses and they provide the boats, marine equipment, facilities and services that enable over 3.2 million people to enjoy boating and water sports on the coastal and inland waterways of the UK every year. We support the industry through a range of services as well as delivering the London and Southampton Boat Shows.

Boating Tourism

Boating tourism is defined as recreational activities which involve travel away from one’s place of residence and involve the use of a boat or watersports craft as their focus. Boating tourism is a very diverse segment of the British tourism market, reflecting a wide range of crafts and activities. As a result the evidence presented in this submission will focus on pure holiday experiences only and report on the core activities that drive these boating holidays:

- Canal boating and other cruising
- Sailing and yachting
- Motorised watersports (including jet skis, waterskiing and wakeboarding)
- Manual watersports (including canoeing, kayaking, paddle boarding and windsurfing)
- General sightseeing trips (including trips by passenger boat and coach)

Boating tourism cannot confined to either an urban or rural setting. Due to the very nature of our inland waterway networks or popular coastal cruising routes, boating tourism can traverse rural and urban destinations, during a single trip.

In September 2015, British Marine published a report on the Domestic Boating Tourism Market in Great Britain.

In Great Britain, boating tourism activities are all big attractions for British ‘staycationers’. In 2014 approximately 5.3 million domestic holidays involved a boating or watersports activity, generating almost £1.7bn for the national economy.

Holidays that incorporate boating or watersports are, in fact, some of the most popular tourism experiences in Britain, accounting for 9% of all domestic holidays. Boating-related holiday experiences are only beaten in popularity by more generic holiday activities, such as sightseeing by car, foot, hiking or visiting a beach.
Over 75% of these experiences take place in England, which recorded over 4 million holidays involving a boating or watersports activity in 2014, a 9% share of the total English tourism market.

This market is driven by the boating haven of the South West, which absorbs over a third of all English boating tourism holidays, but canal boating in the Midlands, sailing on the Suffolk coast and sightseeing boat trips on the Thames are all popular boating tourism destinations and activities.

British Marine enjoys a strong relationship with many tourism bodies that operate in rural England. In response to the EFRA Committee’s key questions, British Marine wish to support those comments made on behalf of the Canal & River Trust.

**Marketing: How well do agencies promote rural destinations across England? What more should the Government do to support this work?**

- Visit Britain’s main focus is on developing the overseas markets for the UK, working with the national tourism bodies for Scotland, Wales and Northern Ireland. Visit Britain’s marketing activity has been generally focussed on the capital and those honeypot sites (many of which are urban locations) that are already attracting significant numbers of overseas visitors. Whilst it makes sense to market those destinations that already have a high awareness, this approach has limited benefit to many lesser known rural destinations. There is also usually a cost for individual destinations to participate in specific overseas promotions led by Visit Britain that are simply unaffordable for many tourism SME’s.

- The abolition of Visit England as an independent body focused on promoting domestic tourism and its subsequent merger into Visit Britain has reduced the level of nationally supported tourism investment. Government has focused its support on promoting inbound tourism, believing that domestic tourism displaces spend from one part of the national economy to another. Rural destinations are disproportionately dependent on domestic visits in comparison with major cities (60% of international visitors never leave London). As a consequence we must persuade more people to holiday at home to rebalance regional economic spend.

- More could be done to support, encourage and coordinate rural tourism networks (e.g. develop synergies between rural tourist destination clusters) which would help businesses share resources, best practice and encourage ‘referrals’ through collaborative marketing and transport initiatives such as cycle routes, bus and private transport options, promotion and joint ticketing.

- Most internet usage is shifting towards mobile and tablet devices which has implications for site design and functionality. Customers have also come to expect good Wi-Fi connections in hotels, restaurants, cafes and attractions. It is imperative therefore that there is good guidance on what a good website should look like, how it should ‘behave’ and the importance of customers being able to access broadband and Wi-Fi services from tourist destinations and their accommodation to make the most of their time during their holidays.

- The ever-growing popularity of Trip Advisor and other consumer review sites reflects the discerning nature of consumers today. Tripadvisor has fundamentally changed
the way in which people research and book their trips (accommodation, attractions and restaurants in particular). Customers no longer rely on professional reviews such as guide books, hotel grading’s or newspaper reviews. With over 150 million people using Tripadvisor each month and 115 new reviews every minute, operators have had no choice but to embrace it. Agency training on social media and how to use Trip Advisor and other consumer platforms to best effect is therefore imperative.

- Agencies should research why people are not coming to rural tourist destinations, then address those issues and develop appropriate targeted marketing. The importance of a ‘good deal’, special offers and discounts have become a fact of life for many operators within the sector. A sensible strategy can work well in off peak periods by encouraging multiple visits but it has led to serious problems for some operators who come to rely on the discount to drive volume. Research undertaken by Mintel in 2013 revealed that 44% of people that visit attractions usually try to find special offers, deals or discounts before visiting a particular attraction.

- Guidance must be swifter from tourism agencies to take advantage and be more dynamic and proactive to trends – e.g. regional events, Pokémon Go, Air B&B etc.

Access: What, if any, changes are needed to give people better access to the coast and countryside?

- Linked services that give ‘door to site’ access to visitors supported by promotion and effective information, i.e. pre visit orientation that visitors can access to plan out how they can get from their front door to the coast / countryside all by public or private transport. A good example is the roving taxi service supporting the Sandstone Trail which is part of the Cheshire Ring Walking Trail.

- Better promotion of cycle, public rights of way & bridleway routes – particularly circular routes that start / finish near public transport or car parks. The responsibility for the management and maintenance of rights of way (some of which are towpaths) is principally with Highway Authorities. Managing these assets under current budget constraints is a challenge which means that signage, interpretation and route clearance is compromised. The provision of better signposted routes with added destination and distance information would help visitors make more informed decisions about which routes are worth taking.

- Focus attention and funding on routes that have better mobility – for prams and wheelchairs.

- Promote a ‘green lane’ network e.g. towpaths, for tranquillity and special qualities these areas provide.

Funding and fiscal policies: How can public funding be best targeted to get new rural tourist businesses off the ground and keep them going? Are changes needed to tax levels and business rates?

- Training support (see examples given)

- Transport support (creative opportunities involving public and private transport initiatives, cycle hire etc.)
- Support for tourism cluster development
- Business intelligence and research support
- A fiscal stimulus to those businesses that seek out new and innovative markets but that need time to take advantage of those new markets (particularly important in relation to the post Brexit economy and opportunity). There needs to be further clarification around the implications of BREXIT and impact on EU Structural Funds as rural areas benefit disproportionately from these sources. There is also a need to provide easier access to grant opportunities for diversification.
- The bureaucracy of LEADER and other EU Structural Funds needs to be addressed in any replacement schemes. Currently funding support for rural areas is very restrictive (e.g. Leader Funding) which relies on an arbitrary classification of market towns / rural areas and a link to job creation. Considering that many opportunities relate to seasonal employment, a better measure for funding to support the rural economy would be economic growth not employment.

Planning and regulation: What, if any, changes are needed to planning and other regulations covering rural areas of special character, such as National Parks, to encourage sustainable tourism?

- Local Planning Authorities are regularly under-resourced and struggle to deal efficiently with planning applications. Some consistency and continuity in planning system would be welcomed. It was unhelpful that the Good Practice Guide on Planning for Tourism was deleted by DCLG in its 2013 Review of Technical Planning Practice Guidance as this creates an advice vacuum.
- Responsibility for tourism signage should be better coordinated. ‘Brown’ signs are very expensive to erect but are essential to drive passing trade and orientate visitors. Unfortunately when some tourism businesses cease operating their brown signs remain which causes dissatisfaction and some distrust of the signs, particularly for impromptu visits of those who were ‘just passing’.
- Regulations should allow (and encourage) more temporary uses for ‘pop ups’ such as events, markets, outdoor cinema, glamping sites etc.
- Consideration of local / regional ‘green’ taxes to support improved rural tourism infrastructure.

Infrastructure and skills: What measures are needed to ensure transport, housing and other infrastructure meets visitor needs? How can the sector ensure there are enough people with the right skills to support customers and businesses?

- Public transport in rural areas is a key concern; if bus services are available they are often infrequent, uncoordinated and unsuitable to support visitors to an area. Greater commitment is needed to support public transport in rural areas, including sustainable tourism strategies to make rural areas more accessible without the use of a car. There are some good examples of seasonal bus services to tourist destinations in rural areas however these networks tend to only be supported during
the summer period, therefore limiting the potential for tourism at other times of the year.
- Salaries within the tourism industry are extremely low and many roles are seen as non-skilled. To attract the calibre of staff required, tourism (in all its functions and roles) must be promoted as a valuable career.
- Attention should be placed on recruiting people with greater emotional intelligence and customer service skills.

Local environment and character: How can national and local policies get the right balance between growing tourism and enhancing the local environment and character?
- There are substantial opportunities to grow rural tourism across England. Honey pot sites continue to be over promoted by the national tourist boards and even at a local level. Lesser known areas, which include our inland waterways, still have spare capacity for both day and staying visitors. Visitors need to be aware of these alternatives and be persuaded to visit. The key is in raising awareness of these alternative options and influencing visitors to consider them.
- By involving the local community throughout so that the benefits of rural tourism become obvious. A good example is ‘Kynren’ a significant outdoor spectacular which involves over 1000 local volunteers who in return learn skills they would otherwise wouldn’t, from pyrotechnics to horse jousting to set building, all whilst celebrating their local history and landmarks.

Defra role: What more should the Department for Environment, Food and Rural Affairs do to ensure government departments (including Departments for Communities and Local Government, Business, Innovation and Skills, Culture Media and Sport and HM Treasury) support rural tourism?
- Defra should make other Government Departments aware that rural communities are very different to some vibrant communities e.g. ageing populations with issues ranging from isolation, hidden deprivation, low wages, poor access to the internet and under-employment and that these issues need to be confronted to stimulate a strong rural tourism economy.
- ‘Lead from the front’. Need to champion the industry, career opportunities and destinations as well as providing support programmes for businesses to help them become more sustainable.
- Fund national surveys which will help small businesses better develop and understand markets and trends.

Developing sustainable rural tourism is about co-ordinating all the facets of a destination, which, in combination contribute to the visitor experience, reflecting the needs of visitors to the area, local residents and local businesses. Deriving economic benefits whilst being sensitive to the local environment lies at the heart of providing a visitor experience of quality.
I do hope that British Marine’s industry evidence and support of the Canal and River Trust’s response is helpful.

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