A Smart Growth Tourism Strategy for Lancashire

Draft

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Prepared by

team

For

Marketing Lancashire

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Introduction

This strategy sets out a new approach for tourism development in Lancashire. It is focused on growth but it is not about the 'old-model' economic growth – rather it is a strategy that will create more benefits than burdens through tourism growth which is SMART:

- **S**ustainable
- **M**utually beneficial
- **A**ccessible
- **R**adical
- **T**ech-led

Lancashire will be the UK's leading SMART tourism destination. This means the county will create and promote tourism growth that:

- Protects the outstanding natural and heritage assets on which the county's tourism depends – no ifs or buts - long-term;
- Is inspired and advanced by a set of mutually beneficial and well-connected delivery partnerships drawing on many different experts and interests from across the county and the rest of the UK;
- Makes Lancashire accessible for all sorts of different visitors, whatever their background or personal circumstances, and also enables people living in Lancashire to play their part and benefit from a vibrant visitor economy;
- Is radical and innovative, building on best practice across the tourism value chain, developing exciting products and experiences, attracting new visitors using the latest marketing methods, with crystal clear delivery and demonstrable impact;
- Is tech-led, with insight derived from new data and digital approaches to ensure that the sector's development is fully understood, and action is supported by the evidence.

This strategy provides a framework to build a better tourism sector. It will not succeed without people working together in ways that are different from the past – in some sense starting again, being open to new thinking, different approaches and new delivery partnerships. It is time for change.

Doubtless there is real opportunity, but challenges also need gripping with a collective zest. Lancashire has not got a well understood offer. It is great in parts but its diversity means it does not present a clear or coherent image. Aside from Blackpool it has no flagship attractors. Accommodation is patchy and some areas have limited things for visitors to see and do. Seasonality can be pronounced, and the county is over reliant on a local and loyal market. Those from further away don't know much about the county's other assets and international visitors have no grasp of the richness of the heritage, the seclusion of the countryside or the friendliness of the people.

Our 10-year Vision is to grow tourism in Lancashire by providing exceptional experiences and transforming people's perceptions of the county. Lancashire will achieve this by being the UK's first SMART tourism destination – one that is truly sustainable, mutually beneficial, accessible, radical and tech-led.

The strategy will deliver this vision by focussing our SMART tourism lens on three main priorities:

- Enhance the leisure offer to provide exceptional product and experiences;
- Transform the awareness and perceptions of the county, its places and its people;
- Strengthen the foundations to enable smarter tourism growth.

The Current Situation

The economic impact of tourism

Tourism already generates significant impact for Lancashire in terms of spending and jobs. It also has a stronger flow-through effect than other sectors as spending by visitors injects income into the heart of local areas and supports numerous small businesses.

Table 1: Lancashire: Tourism Volume and Value 2018				
	Visitor Numbers (m)	Visitor Days (m)	Total spend (£bn)[1]	FTEs[1]
Staying Visitors	8.22	25.55	2.23	40,791
Day Visitors	60.52	60.52	2.18	19,991
Total	**68.74**	**86.07**	**4.41**	**60,782**
Staying Visitors	12%	30%	51%	67%
Day Visitors	88%	70%	49%	33%

1. Includes Direct and indirect expenditure and impacts.

Key takeaways from the table above:

- 9 out of 10 visitors to Lancashire come only for the day;
- The remaining 10% or so, the 'proper tourists', provide half the revenue and underpin two thirds of employment.

This is not just a Lancashire issue. While the strategic focus is on higher spending staying visitors, the county also welcomes all types of visitors irrespective of how long they want to stay. This aligns to the SMART commitment to accessibility.

One of the priority objectives of this strategy is therefore to provide a range of new experiences and things to do that will encourage visitors to come back and stay longer the next time they visit.

Key visitor markets, profiles and trends

Lancashire's markets, reflecting its product offer, are diverse:

- In 2018, tourists from the UK accounted for 90% of overnight visits to Lancashire (as a whole). Approximately 60% of these were visiting for leisure/a holiday. This was higher in Blackpool – over 80% of overnight trips were for leisure and holidays.
- International visitors accounted for less than 1% of all visits and 10% of overnight visits in 2018. They were typically visiting friends and relatives (50%). Just over a quarter (28%) were visiting for leisure/holiday, with 16% coming for business.
- The largest markets were Ireland and Germany. The county has not seen its international visitor markets grow as fast as other parts of the country. This is a concern and is addressed head-on in Priority 2.
- Many domestic visitors are loyal and/or local – those from Lancashire account for 48% of visits. Greater Manchester and Merseyside account for a further 15%. Outside of these areas Greater London and West Yorkshire are the most important.

Trends published by VisitBritain show a number of drivers that are influencing consumers. Unsurprisingly perhaps, being geographically close is a significant factor when visitors choose where to go. Lancashire can do much more, however, to attract European visitors, but alongside any work with the travel trade or consumer marketing the county needs to first provide better experiences and more for these visitors to do. The Dutch touring market for example would love the Arnside and Silverdale AONB but at the moment their arrival is almost by accident and it is often not clear what there is for them to do. This is a key point – because of globalisation consumer choice has exploded which means that Lancashire **must** develop its own USP(s) and set of experiences to compete with many other destinations – the county has to develop its own distinctive signature.

Lancashire can profit from two key trends identified by VisitBritain:

- *Precarious Living* – economic and political uncertainty, terrorism, 'flygskam'1 and Brexit combining to favour growth in UK staycations;
- *The Ageing Traveller* – by 2050 the proportion of over 60s will almost double. Being accessible and welcoming is a key market opportunity.

In addition, travel specialist Skift sees Millennials growing in importance as they demand hands-on tourism experiences and have an interest in wellness – which can include farm to table local food, organics, beauty and spa, countryside, outdoor, and digital detox – i.e. somewhere to unplug and reconnect to the natural world. This plays well into new rural and coastal experiences that Lancashire could become famous for. UK Millennials will soon also become more restricted in their travel options as children arrive and the UK will become a more practical holiday option.

Visitor perceptions and destination image

Data on perceptions of Lancashire is currently very limited. Some information is available from earlier surveys and secondary sources. Guidebooks provide an indication of how Lancashire is positioned by third parties. Key points arising include:

- At present, four geographic areas in Lancashire are promoted in current travel guides: Blackpool, Lancaster, Forest of Bowland / Ribble Valley, and Morecambe Bay. Other areas of the county are not covered: e.g. Arnside & Silverdale AONB; coastal destinations such as Lytham, Lytham St. Annes, and Fleetwood; the cities and towns of Preston, Blackburn and Burnley; and the rural regions of West Lancashire and the Ribble Estuary.
- Blackpool is the highest profile brand – with a loyal audience but also a high proportion of rejectors. Its appeal is regional (NW, Yorkshire, Scotland, NI), socio-economic groups C1, C2D, and more orientated towards 'fun' positioning and a younger audience. Blackpool is written about both in a positive sense as well as in a less positive one.
- The perception of the rest of Lancashire seems to be a rural destination, albeit with a heritage offer – although there is also a

[1] Swedish for *Flight shame* – a trend which is already reducing the growth rate of air travel and could boost staycations. (UBS 2019)

general lack of awareness. Currently Lancashire is appealing more to an independently minded middle aged/older couples' market.

- Associations with Lancashire were countryside/rural retreat, heritage/history, warmth of welcome, walking, nature and wildlife. It is not necessarily associated with luxury, arts and culture, vibrant cosmopolitan towns/cities, adventure sport, and cycling.

Lancashire's Tourism Offer

The Tourism Product

Visitor Offer and Product Themes

There are over 3,100 traditional accommodation establishments in Lancashire with further Airbnb type product. Of the 3,100, Blackpool accounts for 62%, with a further 7% in the Fylde and Morecambe resort areas. The northern and eastern 'rural' districts of Wyre, Ribble Valley and Lancaster (excluding Morecambe) account for about 21% of establishments. This includes a high proportion of self- catering (39% of the Lancashire total) and caravan sites (59% of the Lancashire total). The south and central areas of Lancashire account for 10% of accommodation establishments.

In terms of the current offer:

- Lancashire's tourism offer is diverse with a range of destinations including resorts (e.g. Blackpool, Morecambe, Lytham St. Annes), historic cities (e.g. Lancaster), market towns (e.g. Clitheroe, Ormskirk), post-industrial towns and cities (e.g. Preston, Blackburn, Burnley) and countryside (e.g. the Forest of Bowland, Pendle Hill, Arnside and Silverdale and the Ribble Valley).
- The coast (covering the zone from Lytham to Morecambe) accounts for 69% of the counties 3100 plus known accommodation establishments. The vast majority of these (62%) are in Blackpool. The coast is not a homogenous area.
- The main resort remains Blackpool. As a destination it has significant strengths – its reputation, beach and facilities, attractions (particularly the Tower and Blackpool Pleasure Beach), venues and events. It also has weaknesses – a tired image and accommodation stock, poor retail and deprivation related issues. However, it is undergoing a significant and exciting long-term regeneration programme to address these issues with investments in new hotels, the Winter Gardens and potentially Blackpool Central. Blackpool generally stands alone as a destination and has markets and positioning that are different to the rest of the county.
- Other resorts on the Lancashire coast complement Blackpool in terms of shared markets and appeal (e.g. family markets and events) but also differences in their positioning and markets. The latter is particularly the case for Lytham and Morecambe.
- The northern and eastern 'rural' districts of Wyre, Ribble Valley and Lancaster (excluding Morecambe) account for about 21% of establishments. This includes a high proportion of self- catering (39% of the Lancashire total) and caravan sites (59% of the Lancashire total). This area contains a number of destinations with strong potential visitor appeal – like Lancaster, Clitheroe, the Ribble Valley and the AONBs. Strong product themes include countryside and outdoor activities, heritage, food and drink.
- The south and central areas of Lancashire account for 10% of accommodation establishments. These areas contain a mixture of towns/cities and rural areas. The offer is more orientated to day visitors, non-discretionary business visitors and VFR with visitor draws including a variety of visitor attractions.

Lancashire's product offer can be viewed in terms of a number of generic motivational experiences[2] for two main areas – the Coast and the rest of Lancashire.

The strongest and most distinctive motivators are:

- **Family fun** – on the Coast.
- **Party Fun** – Blackpool.
- **Events** – particularly on the Coast but also elsewhere in the county. The events & celebrations theme can help unify the County.

Three motivators of 'Discovery and Enrich', 'Rest and Chill' and 'Active' are relatively strong and will play well to the emerging market trends around wellness. These experiences do not yet have the strength or depth in their offer when compared to potential competitive destinations. However, there is the opportunity to develop product and experiences to reflect this emerging strength and this is what Strategic Priority 1 is focussed on. Nature and wildlife (especially bird watching) and related activities are currently a very strong niche offer but can also be further developed and be a catalyst for the county's repositioning.

A further motivator with potential competitive strength is conference tourism. This would be primarily in Blackpool (linked to the new Winter Gardens development), albeit there may be some opportunities across the rest of the county (particularly in Lancaster). The leisure themes around nature and the outdoors can certainly be developed, as can the wider heritage offer.

[2] Team Tourism Consulting (2017) on behalf of VisitEngland.

Potential new developments and offers

There are a number of major, potentially transformative projects that will also help to reinvigorate the offer:

- The Eden Project Morecambe is proposed to open in 2023 potentially attracting an estimated 760,000 visitors per year and enabling the wider development and positioning of a complementary natural offer.
- Redevelopment of Lancaster Castle and the Harris Museum, Morecambe Bay Partnership's plan to establish the area as a centre for walking and cycling, and the Botany Bay Outlet Village in Chorley.
- City of Culture – The 'Lancashire 2025' bid has developed an extraordinary creative concept which addresses the city/county issue head on and celebrates a new updated vision of a city for the 21st century.
- Blackpool Central is a proposed £300m development which, over the next decade, will create a "world-class visitor attraction" with new hotels, restaurants, food market, event square and residential apartments. It is estimated that the completed development will attract up to 600,000 additional visitors a year
- The Winter Gardens which will be fully refurbished by 2020 and able to offer dedicated conference space for up to 1400 (with 800 capacity in the main space).
- A number of new hotels in Blackpool including the Boulevard (opened), Sands Venue Resort Hotel, Easy Hotel, Holiday Inn, and a new Premier Inn.
- Blackpool Museum, which will celebrate Blackpool's position as the UK's most popular seaside destination and its role in the development of British popular culture and the birthplace of mass

tourism, is anticipated to open in 2021 and attract approximately 300,000 visitors.

Strengths, opportunities and challenges for tourism in Lancashire.

Strengths

- **Diversity of product**. Lancashire has a diverse product and offer in terms of its destinations (countryside both inland and seaside, seaside resorts, market towns, a historic city) and themes / product (with strengths in food and drink, nature, heritage, industrial heritage, outdoor activities, and country accommodation). Blackpool remains an iconic high-profile destination with major attractions, events, venues and substantial accommodation.
- **Strong events and festivals** throughout the county that are major draws in their own right.
- **Good infrastructure and connectivity in parts of the county**. The significant motorway network into and around Lancashire makes it very accessible by car. Train links are good, particularly to Preston and Lancaster, and Manchester and Liverpool airports provide an important gateway for international visitors.
- **Large population within a close catchment area**. The substantial conurbations of Merseyside, Greater Manchester and West Yorkshire are within a catchment for day trips and short breaks.

Weaknesses & Challenges

- **Lacks a strong USP**. Aside from Blackpool, Lancashire does not have flagship attractors or a strong profile as a visitor destination in the marketplace. Allied to this, there is limited depth of product across a number of potential product / experience themes in comparison to potential competitors. Its diversity is, in this sense, a potential weakness and this is reflected in its indistinct positioning in the marketplace. Apart from Blackpool, there are no strong consumer sub-county destination brands although some districts are being actively promoted to a local / regional market with some success.
- A **lack of itineraries and bookable packages**.
- **Blackpool**. While iconic, Blackpool has a tired image and product, and has had declining visitor levels for a number of years. Like most British seaside resorts, its tourism sector and offer are undergoing a re-structuring and re-positioning. Morecambe and other parts of Lancashire's seaside offer have similar weaknesses.
- **Weak public transport in the countryside** and outdated rural road infrastructure.
- **Quality of the accommodation base**, and quantity and variety of the accommodation base in specific areas. The current hotel stock in Lancashire is tired and needs improvement. In specific places there are gaps in accommodation, e.g. there are no budget hotels in the Ribble Valley, there is no hotel in Ormskirk.
- **Geographical differences**. Parts of the county have limited visitor product and capacity to draw audiences from beyond their local areas other than for non-discretionary business traffic and VFR.
- **Seasonality**. Lancashire, with a predominately rural and seaside offer, has marked seasonality with low occupancy from November to April and low average daily rates (ADRs). This impacts on profitability and investment appeal. The corollary of this is a lack of capacity in certain products (e.g. quality/boutique hotels, and restaurants).

- **Partnership voice**. Diversity of offer and differing local approaches to tourism, means that there is a fractured approach to tourism delivery with county and districts not necessarily pulling in the same direction. This needs to change for a real uplift in performance to be possible.

Opportunities

- **Blackpool's regeneration / renaissance**. Blackpool is pursuing an ambitious regeneration and re-positioning strategy that has secured new operators and investment and is diversifying its offer. This investment creates significant opportunities to attract new audiences and to develop events driven tourism – both business and leisure.
- **Eden**. The proposed Eden Project in Morecambe is a potential catalyst for tourism development – not only in Morecambe but also wider in Lancashire. Eden would attract significant levels of direct visitor activity but also create opportunities to develop associated/spin-off offers and products and provide the county with a major high-profile attractor and marketing differentiator.
- **Optimising product themes and developing experiences for new markets.** Lancashire has existing and potential product strengths that have further development potential and could help to add depth to the offer. These include:
    - Food and drink.
    - Nature and wildlife, and (soft) outdoors.
    - History and heritage – Lancashire has a strong heritage that is ripe for development – e.g. the Pendle Witches, East Lancashire's heritage of 'making things' and the Duchy.
    - Blackpool Museum, Strictly and ballroom dancing.
    - Smaller scale and more bespoke tours could be developed.
- **Flexible, accessible and customised training programmes and business advice** could be developed and offered, particularly to small tourism businesses.
- **Events** – Lancashire has a strong events programme but there are opportunities for the development of a new iconic event or events or further development of existing events to bring direct visitor benefits but more importantly support core product themes and enhance Lancashire's reputation. Examples could include County of Culture, a major Food Festival, Witches Festival, the Festival of Making.
- **Conference tourism**. With the opening of dedicated conference facilities at the Winter Gardens and new hotel investment there are significant opportunities for 'destination' association and corporate conferences (that impact on multiple venues/hotels) in Blackpool. Outside of Blackpool opportunities are more likely to be limited to individual venues (with less scope for destination interventions) but across the county there are opportunities to utilise the county's 'ambassadors' (e.g. academics, research and leading medical and industrial practitioners) to generate and attract conference events.
- **Partnerships between the tourism industry and Lancashire's three universities** to grow business tourism and maximise the value of the 'visiting friends and relations' market
- **Lancashire's core catchment**. Key assets for Lancashire include its transport links (and airports) and catchment population particularly in previous areas of Lancashire (Merseyside / Manchester). There is an opportunity for Lancashire to position itself as the leisure destination for these areas – convenient, easy, hassle free, quiet Lancashire for Lancastrians.

- **Place making** - for parts of Lancashire, particularly in the south and east there is an opportunity for place making through the development of cultural and heritage assets and events and stimulating, social/resident engagement through day/evening visits. The County of Culture bid is part of this narrative.
- **Accommodation, facilities and experiences for people with accessibility needs**. - there is a clear opportunity to further attract the 'Purple Pound' market through further development of the county's accessible tourism offer. VisitEngland estimate that around 250 million tourism trips (day and staying) are taken by those with an impairment and their travelling companions each year, generating £12bn within the wider economy.

The Strategy

Vision, Aim, Priorities and Targets

Our 10-year Vision is to grow tourism in Lancashire by providing exceptional experiences and transforming people's perceptions of the county. Lancashire will achieve this by being the UK's first SMART tourism destination – one that is truly sustainable, mutually beneficial, accessible, radical and tech-led.

The overall aim of this Tourism Strategy is to:

- Use a SMART growth approach to increase the positive impact of the visitor economy in Lancashire.

Three strategic priorities will deliver this aim:

- Enhance the leisure offer with exceptional product and experiences;
- Transform the awareness and perceptions of the county, its places and its people;
- Strengthen the foundations to enable smarter tourism growth.

The target will be to grow the value of tourism spending in Lancashire by 12% over the 10-year period (in real terms). This includes a particular focus on increasing the spending of domestic staying holiday visitors to the rest of Lancashire and increasing the spending for international leisure/holiday visitors across the county (see Table 2). The strategy recognises the importance of day visitors too, both in terms of economic value and because short visits enable greater accessibility to leisure opportunities for a larger number of visitors. There is also an aspiration to address seasonality across the county, with an increase in the level of staying business in the off-peak period (see Table 3).

Table 2: Lancashire: Growth Targets

	Estimated Current spend[1] (£bn)	10 Year growth rate	2030 Aspiration[1] (£bn)
Domestic Staying Visitors	**1.77**	**14%**	**2.01**
Blackpool – holiday	0.43	10%	0.48
Blackpool – other	0.40	8%	0.43
Rest of Lancashire - holiday	0.83	20%	1.00
Rest of Lancashire - other	0.10	5%	0.11
International Staying Visitors	**0.46**	**13%**	**0.52**
Holiday	0.13	20%	0.16
Other	0.33	10%	0.36
Day visitors	**2.18**	**10%**	**2.40**
Total	**4.41**	**12%**	**4.93**

1. Includes Direct and indirect expenditure and impacts.
2. Source: TEAM Tourism based on STEAM, GBTS and IPS data

Table 3: Lancashire: Seasonality Aspiration

	Estimated Current position (% staying visits[1])	Aspiration - Growth rate to 2030
Peak (Jul/Aug)	21%	4%
Shoulder (Apr-Jun/Sep-Oct)	49%	9.5%
Off Peak (Nov- Mar)	31%	18%

1. Source: STEAM 2018 – percentages based on proportion of visits in commercial accommodation.

A Smarter Way Forward

The Strategic Drivers

Underpinning this Strategy is a smart approach to tourism development. This sees a connection to five SMART drivers that will ensure that tourism in Lancashire is both relevant for the market and can maximise its potential. These drivers are **S**ustainability, **M**utual benefit, **A**ccessibility, **R**adicalism and **T**echnology. This framework will enable Lancashire to focus its priority objectives through a lens that can help maximise its long-term development potential – changing from a destination that chases economic growth to one that delivers smart growth.

The building blocks for the SMART approach is to have strong foundations that include a robust range of data and also a focus on enabling areas like support for business and innovative delivery partnerships. Consistently measuring impact and harnessing digital technologies are central to delivering SMART tourism to benefit both B2B users and visitors. Visitor focused technology has often led the way in SMART Spanish cities with for example Wi-Fi zones, I-Beacon technology in retail areas and tourism information mobile apps.

In Lancashire however the leading pillars, informed by evidence gathered as a result of this strategy, are identified as sustainability and accessibility. We will take the United Nations' Sustainable Development goals as a reference point and encourage activities that *promote sustained, inclusive and sustainable economic growth, full and productive employment and*

SMART Tourism Destinations

Over the last five years, the concept of SMART tourism destinations has been developed in Portugal and Spain, basing tourism development and management on a focus of five cross-cutting pillars: innovation, technology, sustainability, accessibility and governance. SMART destinations develop *'strategies to enhance tourism competitiveness by deploying their natural and cultural resources in a sustainable manner, creating innovative products for visitors, hence creating a unique experience for them'*.[1] Such a holistic approach:

- Creates a better experience for tourists and also contributes greatly to the wellbeing of local communities;
- Contributes to the development of a competitive, sustainable and inclusive tourism industry through innovation, digital transformation and shared knowledge;
- Takes advantage of digital technologies and engages stakeholders to use these tools, providing and sharing new knowledge.

City destinations in Spain, working as a network, have developed a Smart Tourism System of information sources, collecting and drawing on a wide range of data sets. These include surveys, barometers, reviews, ticket resellers, telecoms and mobile apps. This has enabled a better understanding of visitors and the supply of relevant information to them. The primary driver in the Spanish context has been the harnessing of technology.

1. 'Global Report on Smart Tourism in Cities', World Tourism Cities Federation *decent work for all; and ensure sustainable consumption and production patterns.*

Application of SMART Tourism in Lancashire

Table 4 shows how the drivers support the strategy's objectives. While all have relevance, Marketing Lancashire and its partners will have a particular focus on the primary drivers in green. The private sector and other interests will also be encouraged to reflect these drivers in their development and marketing activities.

Table 4: Drivers Supporting the Strategy

	Strategic Priorities		
SMART Drivers	1. Using new and existing products develop and package the leisure offer	2. Transform the awareness and perceptions of the County its places and its people	3. Strengthen the foundations to build a Smarter tourism
Sustainable	🟢	🟡	🟡
Mutual Benefit	🟡	🟡	🟢
Accessible	🟢	🟡	🟢
Radical	🟡	🟢	🟡
Tech-Led	🟡	🟢	🟢

🟢 - Primary Driver for Marketing Lancashire and its partners
🟡 - Secondary Driver for Marketing Lancashire, its partners and others

The table reflects the emphasis that Marketing Lancashire will give to each of the five drivers when delivering the strategy's objectives. While innovation runs through the strategy, the starting point will be increasing the sustainability and accessibility of the entire sector. This long-term commitment will play both to market trends and, also to the strength of the natural and other assets across the County.
This approach also dovetails directly to government policy that sees digitalisation, sustainability, workforce development and productivity as key areas of focus.

All these issues are connected into the SMART framework:

- **Sustainability** is a key theme of the UK Government's Tourism Sector Deal and central to other government policies,
- **Mutual Benefit** covers the governance of tourism which will be revitalised with new mechanisms that combine and coalesce talent, resources and funding into new local delivery partnerships;
- **Accessibility** is a market and positioning opportunity where Lancashire has already made progress, is central to the Tourism Sector Deal and is both a driver and an action area under Strategic Priority 2;
- **The Radical and Tech-led drivers** are key themes of the Local Industrial strategy and the glue that connects the Lancashire Enterprise Partnership with Marketing Lancashire and the business sector.

The Tech-led drivers will be particularly relevant for Objectives 2 and 3, connecting with digital marketing and customer insight respectively.

Delivery Context

The strategy recognises that in tourism terms, Lancashire is not a homogenous area. Its constituent parts are at different stages of development and have differing development priorities. The strategy therefore identifies priorities and activity for four different areas:

1. **Lancashire County** – across Lancashire as a whole, there are opportunities for county-wide activity in a number of areas such as business development, training and recruitment, City of Culture and marketing activity particularly relating to areas such as PR, international markets and travel trade.
2. **Blackpool and the Fylde Coast** – Blackpool and Fylde are mature destinations that are going through a rejuvenation process. The priorities for the area (which Blackpool are pursuing) are to invest and modernise the product, broaden the market appeal and attract off peak business through events and conferences.
3. **(Rest of) Lancashire** – Sizeable areas of Lancashire have huge potential and the core priorities of these zones are to increase consumer awareness and strengthen the offer in key product themes (see below).
4. **Local** – at a local level, areas will pursue different priorities and initiatives according to their needs and opportunities – e.g. niche markets (like weddings in the Ribble Valley), place making initiatives, events, and developing day visitor markets. While these should be delivered at a local level, the activity needs to support this strategy and should be agreed collectively so that related opportunities can be maximised.

Flagship SMART Projects

A number of flagship projects that reflect the SMART drivers will be taken forward:

S – A sustainable tourism plan will be developed to align with Lancashire's Tourism Sector Deal application. In addition, the feasibility of a Lancashire-wide *Visitor Giving* scheme will be researched and options considered in Year 1. This work will provide the foundations for roll-out of a county-wide scheme giving greater connection between visitors and the upkeep of the places they enjoy.

M – Mutually beneficial *Delivery Partnerships* will be put in place to guide the direction of the strategy and its key elements. Membership will be inclusive and wide-reaching combining talent from across the county and inviting best practice from elsewhere. The role, make up and functioning of these partnerships will be agreed in Year 1.

A – The Access Fylde Coast project provides the springboard for other *Accessibility* projects across Lancashire. The aim will be to seek funding for new pilot areas, that will use the expertise already developed, to broaden access for visitors of all types. Meanwhile the Fylde Coast will lead for the County and become a beacon for accessible tourism, hosting national conferences and supporting the pilot areas with research and advice.

R – This driver will focus on developing radical, new and innovative products – focusing on the development of experiences that focus on Lancashire's largely unknown and under-appreciated *Natural Landscapes*. A focus on these landscapes, and the businesses and communities within, offer an outstanding opportunity to reposition the County for the longer term.

T – The use of *Technology* to provide a platform for better quality data and a greater understanding of the value of the sector. The first priority will be to assess gaps relating to both customers and performance and develop a dashboard that highlights key metrics illustrating the importance of the sector Further work with stakeholders will define the new insight needed to guide and measure the progress of this strategy.

Experience and Product Themes

Across Lancashire County the focus is on two **primary** experience themes – Wellness and Discovery, and Fun and Entertainment. These are developmental themes – not consumer brands. Underpinning these are a number of potentially strong product themes. These product themes need to be developed to further increase the distinctiveness of the offer and strengthen the experience. These can then underpin marketing messages that will help give Lancashire a more distinctive position in the marketplace. The themes have different area-based strengths. Fun and Entertainment is primarily focused on Blackpool and the Fylde Coast, and Wellness and Discovery on the rest of Lancashire. That said these themes and areas overlap to some extent. There will also be themes and niches that destinations will look to develop at a local level. These will vary according to local priorities and circumstances.

Experience Theme	Product Theme	Description	Theme Strength	
			Blackpool / Fylde Coast	Lancashire
Wellness and Discovery	**Natural Lancashire**	A celebration of Lancashire's environment and nature including its unique landscapes (and their stories), soft outdoor activities, its flora and fauna – especially birdwatching & dark skies. This theme ties into the potential development of Eden North but is not dependent on it.	**	***
	Food and drink	Further development of Lancashire's excellent food and drink offer. Product elements include restaurants, specialist shops and markets, courses and workshops, producer visits, events.	*	***
	Heritage and culture	Lancashire's heritage and culture – focusing on themes and narratives including: The Pendle Witches; Lancashire's Industrial heritage; Duchy – Royal Past and Present; and Blackpool – Britain's Best Resort.	**	**
	Active	More active outdoor pursuits focusing on walking and cycling opportunities in the county.	*	**
	Events	Events are a core component of Lancashire's offer – driving business locally and at specific times but also with potential to support other product themes.	***	***
Fun and entertainment	**Family fun**	Fun holidays, breaks and days out with the family (nuclear, extended, multi-generational). Products include attractions, seaside, shows etc.	***	*
	Party fun	A more adult orientated fun theme – products include attractions, fun /adventure experiences, bars and restaurants.	***	*

Market Segments

The following table provides an overview of key market segments for Lancashire. These are based on VisitEngland's segmentation[3]. NB this analysis excludes events markets (leisure and business) which will have distinctive market characteristics depending on the event.

Market (Based on VE segmentation)	Description	Key experience theme
Country loving traditionalists	Empty nesters with traditional values, which are looking a countryside break. Good quality, secure accommodation is a priority. Food and drinking.	Wellness and discovery
Aspirational family fun	Higher earning families looking for active, child-friendly pursuits, such as the outdoors and cultural visits. Accommodation choices are likely to be quality self-catering and glamping/camping.	Wellness and discovery
Fun families	Family orientated school holidays and days out with a strong focus on coast and beaches. They might be multi-generational families and they tend to be seeking cheaper, more 'social' alternatives to hotel accommodation, such as caravans, holiday camps or self-catering.	Fun and entertainment
Fuss free value seekers	Empty nesters on a budget. They are seeking good value beach holidays with convenient transport links (train, coach) and value accommodation options (both serviced and non-serviced).	Fun and entertainment
Free and easy mini-breakers	A 'young, free and single' pre family segment. Could be travelling as couples or in a wider group of friends. Typically looking for budget/mid-range serviced accommodation.	Fun and entertainment
International	German & Dutch Explorers will like Natural Lancashire. Eden will be a hook for this segment. The US Sightseer market is also a potential segment	Wellness and discovery
	Northern European (e.g. German, Nordic) Free and easy mini-breakers. Blackpool, if packaged right (tied into other regional destinations like Liverpool and Manchester).	Fun and entertainment

[3] See https://www.visitbritain.org/visitor-segmentation
https://www.visitbritain.org/understanding-our-customer-segments

Strategic Priorities

Strategic Priority 1: Enhance the leisure offer to provide exceptional product and experiences

Rationale and Approach

Lancashire's diverse offer is both its strength and its weakness. Although the product themes such as nature and wildlife, heritage, and food and drink have significant latent potential, there is currently limited product and few experiences available in comparison with competitor destinations.

Lancashire has the opportunity both to package and interpret existing product better and develop and create exciting new experiences that combine to make a distinctive, compelling leisure offer for both existing and new markets. This would tie in in particular with ongoing developments, new opportunities such as the transformational Eden Project Morecambe, and other initiatives such as Morecambe Bay Partnership's plan to establish the area as a centre for walking and cycling. A focus on product and experience development will also provide the prospect to further develop existing events, create new ones and support complementary product themes.

The overarching Experience Themes are:

- Wellness & Discovery.
- Fun & Entertainment.

Wellness and Discovery

Natural Lancashire will be Lancashire's key underpinning product theme – potentially building to and from the development of Eden and offering real scope for differentiation and the potential to help to address seasonality. This should be supported by the themes of food and drink, heritage and culture, and active. Together, these product themes can be approached and marketed through a holistic Wellness and Discovery Experience Theme. Aligned with the sustainability driver of the SMART growth approach, new products should:

- Offer a greener form of tourism, stressing care for the environment, enjoyment of nature and locally sourced food;
- Be rural and eco-tourism experiences relating to unique natural landscapes (and their history and stories), world-class bird watching, dark sky experiences;
- Stimulate a first-class outdoor offer with walking and cycling at heart as well as opportunities to enjoy other types of 'wellness' experiences;
- Capitalise on and develop under-used heritage assets based on stories rooted in Lancashire's past like the Pendle Witches, the industrial revolution and the county's history of making things, the Royal Duchy of Lancaster and Blackpool's cultural heritage;
- Position and strengthen Lancashire's high-quality food and drink, building on local, distinctive and sustainable producers and supply networks.

Case study: Experience development at the Irish Wild Atlantic Way
Fáilte Ireland's strategy in growing the tourism economy is grounded in the principals of experience development. An Experience Development Framework serves as the guiding structure for the development of Ireland's thematic Key Propositions that are of strategic tourism importance internationally – the Wild Atlantic Way is one of them. The purpose of the framework is to ensure that a consistent approach is taken to the identification and development of memorable tourism experiences through themes, Signature Experiences and Supporting Experiences that are associated with and can deliver the Key Propositions. The three overarching themes that have been identified for the Wild Atlantic Way are: Spirit of Adventure (Adventure); Life Shaped by the Atlantic (Culture); and Where Land and Sea Collide (Landscape and Seascape). These themes reinforce the region's particular strengths and characteristics, while offering the visitor a compelling reason to visit. The Wild Atlantic Way destination brand *'To create a world class, sustainable and unmissable experience brand that engages and energises the visitor so that they become powerful advocates and leaves them wanting to return for more'* was developed with a specific objective to be a unifying proposition for the West Coast of Ireland. As a result of all the work undertaken, the Wild Atlantic Way has been a growing success since its conception in 2014, each year reaching new record domestic and international visitor numbers and spend – mostly in rural economies. There has also been an increase in the number of international familiarisation and media trips, trade overnight stays, visitors to the project's website and social media pages, business tourism events won for the region, as well as an increased advertising value.

Fun and Entertainment
This Experience Theme comprises family fun and party fun and would focus on family and multi-generational breaks and days out, attractions, shows, and the seaside. The product is strong, and the priority is one ensuring it remains compelling in today's and tomorrow's marketplace. Blackpool's approach fits this need exactly – securing investment in existing attractors (like the Winter Gardens and Blackpool Tower) and developing new ones (like Blackpool Museum and Blackpool Central). Examples of potential developments that would strengthen the offer:

- Adrenalin and adventure activities;
- Contemporary dining and drinking experiences;
- New and varied family orientated attractions.

While the core of the Fun and Entertainment is Blackpool and the Fylde Coast, there is scope to develop new products and enhance existing product across the county.

Events

The strong programme of existing and new events will help to generate visits in their own right but also be the supporting and unifying glue that can connect this product theme geographically across the whole of the county. Across Lancashire, strategic priorities for events will be to:

- Develop a small number of iconic events that are synonymous with Lancashire and Blackpool – helping to raise the area's profile;
- Develop and strengthen events that attract visits when and where they are needed;
- Support and develop the Experience Themes.

Examples could include a winter festival of dance or music in Blackpool or an autumn food festival. The aspiration should be to have at least ten major events with a visitor across Lancashire spread throughout the year.

Product development across Lancashire is to a large extent dependent on individual operators and authorities. However, across the county a co-ordinated approach to product development should include:

Development of networks

Much of Lancashire's existing product is not yet fulfilling its potential and there is scope for improvement in a number of areas (see below). Key to this is strengthening existing operator networks and developing new ones. These networks will bring operators together to look at ways to refine their products, make them more visitor focused, and explore joint initiatives. There should be networks for the key Experience Themes – particularly Natural Lancashire (possibly including Active), food and drink, and heritage and culture.

Development of the narrative to support the Experience Themes

Interpretation and storytelling will be crucial to developing narratives and in-depth product and experiences. These will bring the themes alive, telling the stories that are worth telling that have the strength, depth and appeal to engage visitors.

The development of the Experience Themes narrative should be reflected in on-the-ground interpretation, content and the development of itineraries tailored to target markets and seasons (see Strategic Priority 2).

The product theme of Natural Lancashire deserves a special focus. It was found to be one of the strongest themes during the process of developing this strategy. Natural Lancashire, if well managed and developed, offers real scope for differentiation, addressing seasonality, and focussing on areas not currently being promoted. Within Natural Lancashire there needs to be a focus on Lancashire's main national and international site designations, including Areas of Outstanding Natural Beauty (AONB); Ramsar; Special Protection Areas (SPA); and Special Areas for Conservation (SAC), The designations are not in themselves a draw for visitors, but they explain the importance of specific sites and species at a national and international level, and what makes them special and stand out.

Create bookable experiences

Experiential travel, where visitors desire to have authentic, immersive experiences that combine fun with the opportunity to learn, is an increasingly important global trend. VisitBritain outlines four common components for experiential activity providers:

1. Offer an authentic and unique view (of Lancashire).

2. Create distinctive memories – to remember and share the experience.
3. Provide cultural or historic immersion (of Lancashire) – to build a personal connection to the place and people.
4. Provide a challenge – something different to what visitors do at home.[4]

Lancashire needs more bookable product – experiences that the visitor can pre-book and add to their own itinerary. The product is there – whether it's a cookery class, a foraging experience, a tour of wetlands or the story of the Pendle Witches. Operators need encouragement and support to translate it into visitor experiences that can be distributed through multiple channels – Marketing Lancashire, Airbnb, tour operators.

Co-ordinated regeneration and investment

From Blackpool to Blackburn, Lancaster to Ormskirk, there are exciting regeneration projects happening which are strengthening Lancashire's offer and shaping its places. There is an opportunity to strengthen co-ordination to ensure tourism and particularly the Experience Themes are positioned centrally within regeneration planning and to develop joint county wide investment opportunities – through e.g. hotel investment planning, route development (linking to the Active theme)

[4] https://www.visitbritain.org/experiential-activity-research, Experiential Activities, Discover England Fund Research, Insight Analysis, June 2019

Action Areas

The following table summarises key areas for action:

Action Area	Description
Network development	Development of clusters/networks of operators that have a shared agenda. Marketing Lancashire should lead on networks for the Wellness and Discovery Theme – e.g. Natural Lancashire, food and drink, heritage and culture with Blackpool leading on Fun and Entertainment related networks. There is also scope for area-based networks co-ordinated locally.
Narrative and content	Through networks and with the support of specialist advisors Marketing Lancashire should facilitate operators to develop thematic narrative – stories, interpretation, content – and should develop visitor focused itineraries.
Bookable experiences	Marketing Lancashire, through thematic and local networks, should work with operators to develop bookable experiences for multi-channel distribution.
Co-ordinated regeneration	Marketing Lancashire should work closely with regeneration and economic development functions to ensure tourism is centrally positioned and to explore opportunities for joint development and investment initiatives.
Packaging	Working with the travel trade create appropriate itineraries and options for different segments.

Strategic Priority 2: Transform the awareness and perceptions of the county its places and its people

Rationale and Approach

Awareness and distinctiveness are key challenges for the county and for tourism to flourish they need to be improved. Improving the perceptions of the county will also impact on the wider regeneration of and investment into the county.

Building a unifying tourism 'brand' for Lancashire would be a difficult challenge given the variety of its offer and target markets. However collaborative activity is key. The emphasis in promotional activity should be primarily on the Experience Themes and market segments.

A range of promotional activities should be undertaken with a different emphasis at different levels of the county.

At the county level, the emphasis should be on achieving economies of scale in joint activity like PR and familiarisation visits, targeting certain channels like travel trade and OTAs/third party sites (like TripAdvisor) and possibly county based tactical promotional campaigns – e.g. deal or package promotions like Leicestershire's 'Stay, play, explore' concept.

Below the county level, there should be two distinct campaigns focusing on the two experience themes (Wellbeing and Discovery, and Fun and Entertainment) and domestic audiences.

Case study: Stay Play Explore

Leicestershire is a county that has limited profile as a leisure tourism destination. Midweek occupancies and rates were strong, weekend weaker.

To address this Leicestershire Promotions created it 'Stay, play, explore' campaign. The concept was to package hotels and lead attractions in a discounted weekend deal. It provided visitors with an incentive to visit an area they would not normally consider and filled hotel rooms when they would normally be quiet. It also provided Leicestershire Promotions with an income stream through commissions.

The Wellness and Discovery campaign should have a strong seasonal dimension showcasing and emphasising different experiences (and themes) through the year and have a seasonal market emphasis. For example, the campaign would focus on Country Living traditionalists (for short breaks) in the off peak and shoulder periods and feature products that will have greater appeal to them (e.g. country hotels, food and drink, nature, active), and Active families (for second and main holidays) in peak periods and shoulder periods (notably around Easter and half-terms) with a differing offer (country cottages, heritage attractions and stories….). The campaign should be broadly county wide but focus on product that has the best fit with the themes.

The Fun and Entertainment campaign should have a similar seasonal showcasing with the thrust on fun families (in peak and shoulder periods) and Fuss Free Value Seekers and Free and Easy Mini Breakers (in the shoulder and off peak). The campaign should focus primarily on the

Blackpool and Fylde Coast but could include relevant product in the wider Lancashire area.

International markets, while potentially important, will require a greater investment in terms of time and resources to deliver business. Promotional activity should be tied into the two Experience Themes but should be developed more in partnership with other destinations (either neighbouring destinations or thematically close destinations, or both) and the travel trade. International promotion could also be more tactically based (utilising specific opportunities such as events or anniversaries) or predicated around building awareness in potentially emerging markets (like India) on a long term partnership basis.

Strategically conference development should focus on 'destination' conferences – i.e. association and corporate conferences that generate visits from outside Lancashire and have benefits in the wider destination (beyond the host venue). Examples would be conferences at non-residential venues that use surrounding hotels. The primary opportunity will be Blackpool, with a potentially secondary opportunity around Lancaster (based around the University).

While the main thrust of promotional activity should be around the two experience themes, there is a recognition that these will not necessarily cover every opportunity or priority within the county. At a more local level there will be a need for other awareness raising or promotional activity around niche or specific offers (e.g. weddings, football), specific opportunities (e.g. events), local and day visitor markets or local priorities (e.g. town centre promotions). The nature of this will vary from area to area and cover different areas – e.g. multiple Local Authorities (for, e.g. an East Lancashire promotion), single Local Authority, individual town or BID.

Action Areas

The following table summarises key areas for action:

Action Area	Description
Awareness raising	PR and fam visits, media enquiries, etc. which would be primarily delivered by Marketing Lancashire. For awareness raising around the Fun and Entertainment theme the delivery focus would be on Blackpool and the Fylde Coast. At a local level, there would also be activity around niche themes.
Wellness and Discovery	Year-round promotional campaign delivered primarily at the country level but also thematically reflected in local promotion activity.
Fun and entertainment	Year-round promotional campaign primarily delivered around Blackpool and the Fylde Coast (but with product from the whole county where relevant).
International marketing	A Lancashire campaign, in partnership with the Travel trade, focusing on German and Dutch markets and primarily delivered by Marketing Lancashire. And a potential Nordic campaign in partnership with regional partners – delivered by Marketing Lancashire (in partnership with Blackpool).
Stay, Play Explore	Development of a countywide discount-led short break promotion by Marketing Lancashire
Travel Trade	Development of partnerships with domestic travel operators delivered by Marketing Lancashire (in partnership with Blackpool).
Conference tourism	Destination marketing and sales campaign focused on Blackpool. Across the rest of the county Marketing Lancashire should explore development of an Ambassador Programme and conference bidding function.
Local promotion	Locally across Lancashire, areas should undertake their own promotions where they focus on specific niches (e.g. weddings) or local audiences (e.g. 'Discover your Doorstep' campaigns).

Strategic Priority 3: Strengthen the foundations to enable smarter tourism growth

Rationale and Approach

Trends for tourism in Lancashire are positive but to maximise the opportunity, firmer foundations are needed, including improvements to:

- The range and depth of underpinning research and insight;
- Workforce skills and training;
- Support to help Lancashire's small businesses grow and prosper;
- Infrastructure – physical and digital, as well as placemaking.

These sort of 'enablers' remain important for the long-term growth of the visitor economy and will also support increases in the productivity of the sector – an issue which has been highlighted by the Industrial Strategy. Some of them, such as poor transport infrastructure within the county, also affect the performance of the wider economy. Surveys undertaken for this strategy however reveal their continued importance for those connected to the development of the tourism sector.

Important though these issues are, only one of the four relating to research and insight can be led by Marketing Lancashire. Other public agencies, local authorities and the private sector will have a key role to play in leading action on activity around skills and training, small business growth and infrastructure improvement. How these elements are considered and delivered in the context of tourism will need to be developed in close consultation with the LEP and other partners.

Provide Depth Insight

A longer-term research programme related to the County's visitor economy will underpin and inform the strategy, allowing both for a better understanding of visitor trends and also to measure the baselines and the extent to which the priorities are being delivered. The national tourism surveys, such as the International Passenger survey for example, are not granular enough to provide good insight for Lancashire and this gap needs to be filled. Gaining a new depth of customer insight should be an early priority and ideally a biennial visitor survey should be undertaken during the lifetime of the strategy. Insight on international tourists should be prioritised. Having a wider understanding of Lancashire's visitor trends and types, their motivations, levels of awareness and perceptions, will make marketing activity more effective, improve the inputs and hence accuracy of existing tools (notably the STEAM tourism economic impact model) and also ensure that the priorities, such as experience development planning, can be successfully supported and rolled out.

Other insight on elements of the market, the nature and extent of, for example, the accessible product and the performance of tourism businesses across the county will be helpful to set baselines and monitor delivery. Joint research activity could be funded by a partnership made up of a number of organisations including the county's universities which can plan and organise surveys of mutual importance across a range of topics.

Re-engage the Workforce

Training and skills are a key part of the national Tourism Sector Deal because it will be one of the central issues facing the post-Brexit visitor economy, and part of the role of the Skills and Employment Hub. Subject to final regulations, any potential reduction in the availability of EU

Labour Shortages as a barrier to tourism growth in Finland

In Finland, it was found there were numerous tourism vacancies alongside many unemployed people trained to work in the tourism industries! Often these people did not have the required skills for the vacant jobs. The Ministry of Economic Affairs and Employment launched the Matkailudiili programme to improve the employment and recruitment of a skilled workforce to address tourism industry vacancies. Three sets of measures were developed to address the labour shortage challenges:

- Raising the image of tourism work and industry;
- Closer co-operation between different tourism stakeholders;
- Tourism employment pilot projects.

In 2018, 27 pilot projects were launched to find new solutions for improved employment in the industry. The aim was to improve access to tourism employment as well as cooperation between public services and private recruitment agencies. The projects included:

- Training programmes for job seekers and tourism businesses;
- Initiatives to recruit international tourism and hospitality professionals;
- Marketing campaigns and study possibilities for the 16-26 age group;
- Cooperation programmes seeking to employ forestry workers to tourism businesses during winter season layoff;
- Digital platforms and training to attract people to tourism and hospitality industry vacancies.

The results have increased knowledge of tourism study and employment possibilities, increased national and international interest in tourism jobs available and improved understanding among the national employment services of industry circumstances, business needs and employee requirements.

migrants could exacerbate a lack of job ready applicants while there are already deep-seated negative perceptions of the sector – views which can be shared by both career advisors and potential recruits.
This structural issue is one that needs addressing because the growth scenarios that this strategy foresees demand a consistent supply of trained, skilled and motivated people. One big strength of the tourism sector is that it is fully inclusive, creating career pathways for all types of people from different backgrounds and with varying qualifications. The issue of getting the right people into the right jobs is also one that has exercised other countries. Finland, for example, which consistently tops the global league table for the quality of its skills and educational systems,[5] created a specific programme to address its tourism skills issue. This strategy should draw together a partnership of agencies and educational providers to review the success of the work in Finland and possibly replicate it or build on it in the context of the specific challenges facing the county. The aim is to ensure that people are well placed to seize the job opportunities that will arise and are motivated to do so. The Skills and Employment Hub, alongside a re-focused Tourism Academy, could play a role in delivering this agenda.

Focus on the Lifeblood of the Industry

This strategy is about smarter growth which means it needs to provide a focus on supporting micro-businesses – in the UK 95% of businesses are micro-businesses with fewer than 10 employees – and the nature of tourism means that the sector over-indexes on that benchmark. Many organisations in Lancashire, such as the Forest of Bowland AONB, have put in place programmes that have supported local tourism businesses, in that case to create a more sustainable business sector. This has worked well but more needs to be done working with the LEP and the

[5] E.g. OECD (2017) How's Life? 2017 Measuring Well-Being

Boost Business Growth Hub as key partners. Stimulating and supporting entrepreneurship is critical. The development of networks (Strategic Priority 2) have a role in this.

Shape up the Infrastructure and Make Better Places

Tourism thrives on good transport connections and great places. While the transport infrastructure to Lancashire is excellent, travel within the county is often poor with a lack of public transport, poor parking provision and town centres in need of regeneration.

The county's local authorities have a key role to play in considering the importance of tourism within the numerous plans that are in train to improve the urban centres of the county. Premises Improvement Grants have been used effectively in places like Pendle to support business improvement while at the same time undertaking wider regeneration schemes and renewed transport hubs. Infrastructure and transport development should be linked with co-ordinated regeneration and investment (see strategic priority 2).

Action Areas

The following table summarises key areas for action:

Action Area	Description
Research programme	Marketing Lancashire should develop an on-going programme of research. Priorities include insights into visitor characteristics (particularly in terms of segments) perceptions and awareness, and market testing of the Experience Themes.
Recruitment and training	The Skills and Employment Hub, alongside Marketing Lancashire and Blackpool Council (through a potentially re-focused and re-invigorated Tourism Academy) should explore options through the Tourism Sector Deal to address training and recruitment issues.
Business Support	Through a partnership approach and the tourism networks, look to deliver targeted business support that enables businesses to develop. Priorities could include digital marketing & creating bookable products
Infrastructure and Place making	Marketing Lancashire should ensure tourism is embedded in decisions and planning on place making and infrastructure development.