Building Better Demand
A plan to extend the reach and benefit of Lancashire's visitor economy

They came
They saw
They hired a van, bought a house, moved their family, started a business and never looked back.

Quite literally, that is what Richard and Lucy Few did. Listen to their story as part of our Lancashire Ambassador podcast series here. It perfectly demonstrates the power of the visitor economy and how it impacts both the perceptions of a place and the appeal of it, attracting talent and investment, not just visitors.

Speaking at the recent 'City Nation Place' global conference, Jose Torres, CEO of world-renowned Bloom Consulting, recognised the connection between better perceptions generating better demand – not just more, better. This plan, developed in partnership with the Local Enterprise Partnership's 'Tourism, Culture and Place' sector group, focuses on building better demand in order to grow the visitor economy in Lancashire, directly recognising the wider impact that growth will have.

Foreword from Sector Group Chair – to come.

The Lancashire Enterprise Partnership
The LEP is a strategic collaboration between business, universities and local councils which directs economic growth and drives job creation. The LEP has identified five key sectors which will drive economic growth and has established a set of sector groups to lead on the development of growth plans. The Tourism, Culture and Place sector group, convened by the LEP, is made up primarily of private sector partners and has provided significant input and insight to the development of this plan, looking at both immediate and longer term issues which could affect the resilience and growth of the sector.

Marketing Lancashire
Marketing Lancashire is the agency charged with promoting the county on a national and international stage. We are a not for profit organisation working in the interest of a prosperous Lancashire. We reinvest all our partner fees into promotional activity for the county to develop Lancashire into a leading leisure, learning and business destination for domestic and international visitors, to enhance the national and international reputation of the county and promote sustainable economic development and growth. Lancashire has one of the largest economies in the Northern Powerhouse, with over 52,000 businesses generating £34 billion per year.

Visit Lancashire is the official tourist board for the county and a division of Marketing Lancashire. We work closely with VisitBritain, VisitEngland and a wide range of public and private sector agencies. Our activities in marketing and communications, commercial membership and place marketing are all designed to grow the visitor economy and develop the destination as a great place to visit, work and invest. We have worked closely with the LEP's sector group, with Lancashire's local authorities and with our wider partnership and stakeholder group in the development of this 3-year plan.

Strategic Context
The importance of the visitor economy is, finally, being recognised by central Government. In their response to the DMO review, in the publication of their own Tourism Recovery Plan in 2021, and within the UK Shared Prosperity Fund, which identifies specific interventions including:

E8: Funding for the development and promotion of wider campaigns which encourage people to visit and explore the local area.
E17: Funding for the development and promotion (both trade and consumer) of the visitor economy, such as local attractions, trails, tours and tourism products more generally.
E25: Grants to help places bid for and host international business events and conferences that support wider local growth sectors.

The sector also has a key role to play in the levelling up agenda, due to the impact it has on the health and wellbeing agenda, on pride in place, and the contribution it makes in terms of skills and job opportunities.

At a regional level, the NP11 has published a 'Place Strategy for the North', developed in partnership with Arts Council England, Historic England, The National Lottery Heritage Fund and The Environment Agency. The strategy sets out 13 actions with a focus on pan-Northern collaboration, complementarity between places and prioritising investment in creative talent and the cultural reanimation of places and spaces.

Specifically, the actions that this plan can be aligned to support are:

- Strengthening the North's Place Proposition – working with Northern DMOs, ALBs and local places and partnerships to better convey the collective strength of the North's place proposition, focused on cultural, heritage and natural strengths and assets.

11) Optimising Green Tourism – development of a digital app for the North which co-ordinates walking and cycling networks, public transport and electric vehicle charging points to optimise sustainable travel and green tourism.

At a local level, the Lancashire Enterprise Partnership identifies the visitor economy as one of the county's five priority sectors, and a critical part of its Internationalisation strategy – a ten year roadmap for global growth. It is also recognised as a key strategic sector within 'Lancashire 2050':

We will be a globally-recognised, competitive and sustainable economy distinguished by its quality of life, connectivity and access to opportunities. A theme priority:
- To maximise the economic benefits of Lancashire's tourism offer and promote a diverse place with urban, coastal and rural economies.

As well as connecting to the above, this plan builds on 'Redefining the Rule of Six – a recovery plan for Lancashire tourism and hospitality', published in 2021. It revisits and revises the draft Tourism Growth Strategy for Lancashire, which was about to be consulted on back in spring 2020. It also aligns with 'Remade: A Cultural Investment Strategy for Lancashire', which was published by the Lancashire Enterprise Partnership in May 2020 and was updated January 2021.

The connection between tourism, culture (and the cultural sector in its broadest sense) and a destination's sense of (and pride in) place is complex and multi-faceted. There is much that the tourism and hospitality sector could and should learn from the cultural sector, and vice versa. This plan seeks to act as both a visitor economy growth strategy and a 'tourism, culture and place' sector plan. It does not replace, but seeks to support the 'Remade' cultural investment strategy for Lancashire, and also to connect with the destination specific cultural strategies and Destination Management Plans in existence and/or development across the county.

Background

The Covid-19 pandemic had a devastating impact on a whole range of sectors and communities, but none more so than those involved in culture, tourism and hospitality. Government support through grants, the furlough scheme, reduced VAT and so on, helped many businesses to survive the worst. However, a sector that has always existed on a 'hand to mouth' basis, has ended up more fragile than ever.

Most recent figures (2021) show that Lancashire's visitor numbers had grown back to 75% of pre-covid levels (the county attracted 68.74million visitors in 2018), and 80% of economic impact (the sector contributed £4.41 billion to the local economy and helped support over 60,700 jobs before covid hit). These are positive results, outperforming other parts of the North West, and are testament to the resolve, resilience and determination of Lancashire businesses and organisations.

However, the sense on the ground for 2022 is that whilst visitor numbers should continue their upward trajectory, with footfall up in many destinations to pre-covid levels or higher, the economic impact that those visitors generate will be severely impacted. Lancashire has been over-reliant on domestic tourism for many years, and as international visitor numbers slumped UK-wide, that familiarity amongst the domestic audience may well have helped our initial recovery. However, as the cost of living crisis bites, the majority of the domestic market – and certainly Lancashire's traditional visitor base – simply doesn't have the disposable income to spend. The VisitEngland sentiment tracker shows that the rising cost of living has been the top potential barrier to taking a UK holiday or short break since April 2022, and has increased by 10% over the past 5 months.

Certainly, now is not the time to give up on attracting domestic visitors to Lancashire. The 'staycation' boom driven by covid continues to have a residual impact, with VisitEngland's sentiment tracker showing that whilst 4 out of 5 people are concerned about the cost of living crisis, 19% still intend to take a UK short break between January and March 2023, significantly higher than in 2020 and 2021. These 'winter intenders' are primarily driven by wanting to 'get away from it all and have a rest' or to 'spend time with my family/partner'. In terms of activities they are most likely to 'try local food and drink' or go 'walking, hiking or rambling', and the top two most popular destination types are 'countryside or village' and 'traditional coastal/seaside town'. Lancashire is clearly well placed to attract these visitors and Marketing Lancashire is developing a specific campaign focused around food and drink to help businesses in the county maximise that opportunity.

But, as we look ahead to FY23/24 and beyond, we want to grow the visitor economy in value, not just volume. We want to generate a higher spend per visitor, which means attracting higher spending visitors. We want to enable businesses to adapt and grow, creating jobs

Our vision
To grow the visitor economy in Lancashire by providing exceptional experiences and transforming people's perceptions of the county. Aligning closely with the Lancashire 2050 priorities, we will do this by becoming the UK's first SMART visitor destination – one that is truly **S**ustainable, **M**utually beneficial, **A**ccessible, **R**adical and **T**ech-led.

A 'SMART' Approach
Viewing visitor economy growth through a 'SMART' lens means that Lancashire will focus on creating and promoting growth that is:

1. **Sustainable**: Protects the outstanding natural and heritage assets on which the visitor economy – and the wider quality of life proposition – depends. No ifs or buts – long term;
2. **Mutually beneficial**: 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;
3. **Accessible**: Focused on making Lancashire accessible for all sorts of different visitors, whatever their background or personal circumstances, and also enables people living and working in Lancashire to play their part and benefit from a vibrant visitor economy;
4. **Radical**: and innovative, building on best practice across the supply chain, developing exciting products and experiences, attracting new visitors using the latest marketing methods, with crystal clear delivery and demonstrable impact;
5. **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.

The opportunity
The Tourism, Culture and Place Sector Group commissioned a refreshed evidence report (see Appendix A) which identifies a number of short term and longer term travel trends that provide an opportunity for Lancashire to grow its visitor economy in a sustainable, mutually beneficial way (benefitting businesses and residents as well as future visitors). The county has a number of competitive advantages:

- Lancashire has a diverse product and offer in terms of its destinations (countryside both inland and coastal, seaside resorts, market towns, a historic city) and themes/experiences (with strengths in food and drink, nature, heritage and industrial heritage, outdoor activities, country accommodation).
- Blackpool remains an iconic, high profile destination with major attractions, events and venues, and a substantial accommodation stock
- Major new developments coming in the next few years, including Showtown, Blackpool Central and Eden Project Morecambe, can act as a catalyst for growth across the county.
- Strong events and festivals throughout the county are major draws in their own right.
- Our location makes Lancashire very accessible by car, train and plane.
- The substantial conurbations of Merseyside, Greater Manchester and West Yorkshire are within a catchment for day trips and short breaks.

The challenge
The sector group also commissioned perceptions analysis at a UK level which identified a real lack of awareness of what Lancashire as a county has to offer. Individual destinations fared better, particularly Blackpool – strongly associated with family fun, bars and nightlife, shows and entertainment – although levels of rejection (people who would not consider visiting) were relatively higher for Blackpool than the rest of the county or other comparator destinations.

Morecambe and Lytham are relatively well known as coastal destinations, Lancaster for its heritage and culture, and the Forest of Bowland and Ribble Valley for nature and the outdoors. However, the majority of respondents had no strong associations for any other part of the county. This lack of awareness is mirrored in the research behind the Internationalisation Strategy, with global audiences more likely to be aware of the county's constituent parts rather than the county as a whole. Working to address this will be key to generating better demand.

Our headline 'plan on a page' (S,M,A,R,T identifies how each initiative connects to the SMART approach)

Product Development	Productivity	Resilience
To support innovation and connectivity across the supply chain through the development and packaging of exceptional product and experiences.	To increase productivity and economic impact by reaching out to new markets, attracting new, higher value visitors to Lancashire and extending the season.	To improve the resilience of the sector and the prospects of its businesses and employees over the long-term.
Key Initiatives	Key Initiatives	Key Initiatives
• Develop thematic clusters/networks of operators that have the ability to 'package' product together. **M** • Develop thematic narrative – stories, interpretation, content – and visitor focused itineraries. **R** • Create bookable experiences for multi-channel distribution. **T** • Work with the travel trade to package appropriate itineraries for different audience segments. **A** • Position tourism, culture and place at the heart of economic development and regeneration planning. **S**	• Target media familiarisation visits from priority markets and publications related to thematic strands. **M** • Deliver year-round promotional campaign activity, utilising digital innovations to increase reach and trackability. **T** • Build on Discover England Fund projects to reach international audiences and travel trade / groups. **A** • Develop a countywide, discount-led short break promotion for the shoulder season. **R** • Establish a conference ambassador and bidding programme working closely with Lancashire universities. **M** • Support local promotion of specific niches (i.e. weddings) and hyper-local audiences. **M**	• Develop a long-term research programme that will provide greater insight on visitor characteristics and perceptions. **T** • Review training and skills needs in both a post-Covid and post-Brexit context to strengthen the workforce pipeline. **S** • Create a targeted business support programme that focuses on innovation, accessibility and diversification to generate investment and growth. **R** • Explore how the visitor economy can contribute to net zero goals. **S** • Ensure culture and tourism play a major part in place-making initiatives, particularly those connected to Town Deals and Future High Street Funds. **M**
Key Stakeholders	Key Stakeholders	Key Stakeholders
• Tourism, Culture & Place Sector Group • ML, partners and the wider private sector • Local Authorities and the LEP • Local and national networks (i.e. AONBs/National Trust/Arts Council) • VisitEngland/VisitBritain • DCMS	• Tourism, Culture & Place Sector Group • ML, partners and the wider private sector • Local Authorities and the LEP • VisitEngland/VisitBritain • University of Central Lancashire/Lancaster University/Edge Hill/University of Cumbria • B2B and B2C Travel Trade partners • Manchester and Liverpool Airports / TOCS	• Tourism, Culture & Place Sector Group • ML, partners and the wider private sector • Local authorities and the LEP • Lancashire Skills & Employment Hub • FE and HE institutions • Boost (and Boost delivery partners) • Creative Lancashire and Arts Lancashire • BEIS, DCMS and MHCLG

Connecting our varied assets to the county
Based on external and internal insights, as referenced above, we need to connect the individual place assets in Lancashire to the county that they are in, activating the pride in place of our local residents. Currently, Lancashire too often gets lost, buried at the bottom of an address or simply not referenced at all. In order to raise awareness and change perceptions, we need to consciously and collectively address this – something that all stakeholders can commit to and support.

Capitalising on our new assets
A great opportunity to address the above, alongside a need to further showcase the excellent assets that we already have, Lancashire also has a number of new and enhanced visitor attractions and experiences coming on stream which have the potential to help drive the narrative. The list below is far from exhaustive and will be added to as we progress through the consultation process. It is also intended to be broad in scope, encompassing investments that may not be directly related to the visitor economy, but impact the wider quality of place that is such a key part of the overall attractiveness of Lancashire destinations. Below is just a taster of some of the major – both privately and publicly funded – new developments:

- Showtown - Museum Project, Blackpool –scheduled for 2023
- £300m Blackpool Central including relocation of the courts 2024
- £39.5m Town Deal Blackpool includes upgrade to Illuminations
- £30m Winter Gardens Conference & Events Centre 2020 (opened 2022)
- Morecambe Winter Gardens restoration
- £125m Eden North Project, Morecambe
- £25m Darwen Town Deal, kick-starting the transformation of the town
- £25m Leyland Town Deal including market refurbishment
- £20m Burnley campus extension, public realm transformation and railway station improvements, plus the Pioneer Place development
- £6.5m Colne town centre and heritage quarter development
- £2.2 m redevelopment of the Whitaker Museum and Art Gallery (completed 2021)
- £20m Re-imagining the Harris – scheduled to reopen 2024
- Animate £41m cinema and leisure complex Preston approved
- Rossendale adventure golf park in Rawtenstall
- Ormskirk Markets redevelopment
- Accrington Market Redevelopment
- Fairhaven Lake improvements
- Bacup, Burnley, Fleetwood, Kirkham, Lancaster and Ormskirk High Street Heritage Action Zone investments
- Multi-million pound investment in 'Valhalla' at Blackpool Pleasure Beach (opening 2023)
- £45m indoor attraction Adrenaline World, Stanley Park Blackpool
- £21m extension to Houndshill shopping centre, Blackpool
- £1m renovation Astley Hall Chorley (reopened 2022)
- Lancaster Canal Quarter development– details tbc
- Lancashire Cricket Ground – second site Farington, South Ribble
- Combined grant £1.25m for Blackburn Museum and Towneley Hall
- £12m restoration East Lancashire Railway
- £9.3m transformation Exchange Blackburn – an arts centre and community hub
- £3m Worden Park refurbishment (reopened late 2022)
- £654k Linear Park pilot Super Slow Way
- Luxury woodland lodges coming to 2 Michelin Star Moor Hall
- Bowland & Bay Food Tours

The county also has a number of new and imminent hotels and accommodation developments, from the Boulevard and Sands hotels in Blackpool to Crow Wood in Burnley, the Ellel Holiday Village near Lancaster and an array of new glamping sites, all adding to the 58 thousand beds already available across the county. Plus, of course, Lancashire's established and evolving series of events which shine a spotlight on the county on a regular basis. There are also a number of new infrastructure and facilities developments taking place across the county, including sustainable 'active travel' initiatives, which will help to make these assets accessible to a wide audience.

Developing a thematic narrative

The proposal is to focus on two primary experience themes (to note – these are developmental themes, not consumer brands) underpinned by a number of potentially strong product themes. [NB – subject to feedback we will create a matrix with the final plan which will overlay proposed thematic narratives with key assets]:

Experience Theme	Product Theme	Description
Wellness and Discovery	Natural Lancashire	A celebration of Lancashire's environment and nature, including its unique landscapes (and their stories), outdoor activities, flora and fauna – especially birdwatching and dark skies. Obvious opportunities to connect to Eden North.
	Food and drink	Further development and profile of Lancashire's excellent food and drink offer, including restaurants and pubs, specialist shops and markets, courses and workshops, producer visits and events.
	Heritage and culture	Focusing on themes and narratives such as Pendle Witches; industrial heritage and textiles, linking to the Linear Park; the Duchy – Royal past and present; the coast, and Britain's favourite seaside resort.
	Active	More active outdoor pursuits, including walking and cycling but also showcasing 'Adrenalin Valley' and so on
Fun and entertainment	Events	A core component of Lancashire's offer - driving business locally and acting as a time specific opportunity to convert intenders into visitors. Events also support the other product themes.
	Attractions	Lancashire has a strong base of ticketed visitor attractions (set to be added to by Eden North), which again support the other product themes but provide a reason in themselves to visit the county.
	Family fun	Fun holidays, breaks and days out with the family (nuclear, extended and multi-generational). Products include attractions, seaside, shows etc
	Celebrations	A more grown-up fun theme with products including attractions, fun/adventure experiences, wedding and event venues, bars and restaurants.

These product themes need to be developed in consultation with stakeholders to further increase the distinctiveness of the offer and to inform investment decisions to strengthen the experience. In the short term at least, highlighting the value for money that Lancashire's visitor offer provides will be a key part of our response to the economic conditions. There will also be additional themes and niches that destinations will look to develop at a local level according to local priorities and circumstances.

Setting ambitious targets
The overall aim of this sector plan is to:

- Use a Smart growth approach to increase the reach and benefit of the visitor economy in Lancashire

We will focus on three strategic priorities:

- Product Development - supporting innovation and connectivity across the supply chain through the development and packaging of exceptional product and experiences.
- Productivity - increasing productivity and economic impact by reaching out to new markets, attracting new, higher value visitors to Lancashire and extending the season.
- Resilience - improving the resilience of the sector and the prospects of its businesses and employees over the long-term.

Our headline target is to grow the value of the visitor economy above pre-Covid levels (last measured in 2018) by 2025:

Visitor Economy Growth Targets			
	Economic impact 2018 (£bn)	3 year growth target	2025 Aspiration
Domestic staying visitors	1.77	6%	1.86
International staying visitors	0.46	5%	0.48
Day visitors	2.18	4%	2.27
Total	4.41	4.5%	4.61

This includes a particular focus on increasing the spend of domestic and international staying visitors, but also recognises the importance of day visitors, both in economic impact but also 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 visitors in the off-peak period:

Seasonality Aspirations		
	Estimated 2018 position	Aspiration growth rate to 2025
Peak (Jul/Aug)	21%	2%
Shoulder (Apr-Jun/Sep-Oct)	49%	5%
Off-Peak (Nov-Mar)*	30%	8%

** A note of caution here related to the current challenges re increased energy costs potentially impacting businesses ability to open during the winter months*

In terms of measuring outputs related to these growth aspirations, we intend to align with the UKSPF output framework, seeking to measure the following:

- Jobs created and safeguarded
- Number of organisations supported
- Number of people reached/levels of engagement
- Number of tourism, culture or heritage assets created or improved
- Number of local events or activities supported
- Number of new events attracted to Lancashire

Next steps

This is a second draft of the sector plan which incorporates feedback from the Tourism, Culture and Place Sector Group. It has also been shared with the Marketing Lancashire Board, Local Authority Stakeholders and Arts Lancashire, with some initial comments from them also addressed. We now want to share this more widely and invite feedback from all partners, stakeholders and anyone with a vested interest in the Lancashire Visitor Economy.

We have developed a short survey to help us capture feedback, which can be accessed here. Once finalised, this plan will form the basis of the next three year business plan for Marketing Lancashire, set to be an accredited 'Local Visitor Economy Partnership' by April 2023.