

Lancashire

Building better demand



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

LANCASHIRE COUNTY COUNCIL

In anticipation of a new devolution deal for Lancashire, the County Council is driving a mission to integrate and enhance critical capabilities. This endeavour strategically places entities like Marketing Lancashire at the heart of economic policy delivery.

A shared Local Authority vision within the Lancashire 2050 framework is a thriving tourism sector that boosts both the region's charm and economic growth. Working closely with Lancashire Enterprise Partnership, the focus is on innovation, infrastructure, and job creation, while Marketing Lancashire takes the lead in crafting compelling narratives and engaging campaigns to enhance the region's appeal. Together, they're shaping Lancashire into a top-tier destination.

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, 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 55,000 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.



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.



Walk about theatre, Lancaster

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 individual cultural development plans being created by Blackpool and Blackburn with Darwen, both recognised as places of special interest by Arts Council England.



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, increasing 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 also want to grow economic impact whilst minimising the potentially negative impact on our coast and countryside. We want to look at best practice from elsewhere too, considering initiatives such as the £1 'tourist tax' already implemented by Manchester and being considered by Cumbria.

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 Sustainable, Mutually beneficial, Accessible, Radical and Tech-led.



Cleveleys beach

A 'SMART' APPROACH

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

Sustainable:
Protects the outstanding natural and heritage assets on which the visitor economy – and the wider quality of life proposition – depends. Recognising that this is only possible through far-reaching, collaborative working, particularly in relation to transport infrastructure;

Mutually beneficial:
inspired and advanced by a set of mutually beneficial and well-connected delivery partnerships, and focused as much on the 'hyper-local' audience of Lancashire's own residents as well as on visitors from outside the county;



Walking up Pendle Hill

A NOTE ON SUSTAINABILITY

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;

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;

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.



Viewing visitor economy growth through a 'SMART' lens

Consumers have become much more aware of the environmental impact of their holiday and leisure choices. Reducing their carbon footprint is becoming a more important factor in consumer decisions.

However, there is some uncertainty on how they do this – although measures include reducing flying, recycling, purchasing from 'green' businesses, using local products (including food) – and consumer commitment varies. There is a need for all sectors in Lancashire to play their part in accelerating the journey towards net zero, and tourism and hospitality could help to lead the way.

The sustainability agenda is going beyond climate resilience and carbon neutrality and is also increasingly about community and social sustainability with a greater awareness of the impacts tourism can have. Going forwards, communities will have a greater role in destination planning and management, as identified in the Lancashire 2050 strategy.

As noted at the start, there is a clear opportunity for the visitor economy to support the sustainability of the wider economy, not just through the use of a local supply chain, but in the creation of a sustainable workforce and through utilising the principles of building a better business and a focus on the triple bottom line of profit, planet and people. For all of these reasons, we propose that the 'S' in 'SMART' should become our primary focus.

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, and many have ambitious plans for growth.
- The significant motorway network into and around Lancashire makes it very accessible by vehicle, and with the ongoing popularity of travel by camper van/ motorhome there could be an opportunity to embrace that market, being mindful of the requirement to offset carbon.
- The substantial conurbations of Merseyside, Greater Manchester and West Yorkshire are within a catchment for day trips and short breaks and improved transport links could greatly increase demand.

The Blackpool Tower



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 St Annes 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.

However, it is not only the lack of awareness of Lancashire's offer that is a challenge for the growth of the visitor economy. Transport remains a major issue, both the lack of public transport connectivity across the county, and the current unpredictability of what does exist (trains to and from Manchester Airport for example). We must also focus on sustainable travel and encouraging 'active travel' across the county for both residents and visitors. The Eco Escapes project has best practice lessons to share.



Moor Hall garden, Aughton

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.
- Sustainability - improving the sustainability of the sector (environmentally, financially and socially) 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 2027:

VISITOR ECONOMY GROWTH TARGETS			
	Economic impact 2018 (£bn)	4 year growth target	2027 Aspiration
Domestic staying visitors	1.77	6%	1.86
International staying visitors	0.46	5%	0.48
Day visitors	2.18	4%	2.27

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 2027
Peak (Jul/Aug)	21%	2%
Shoulder (Apr-Jun/Sep-Oct)	49%	5%

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

We will also set targets specifically related to sustainability. Increasing the average length of stay, for example, increases value per visitor but should also decrease the carbon impact of each individual visitor day.

SUSTAINABILITY ASPIRATIONS		
	2018 position	Aspiration for 2027
Average length of stay	3.1 nights	4 nights
No. of sustainable tourism accredited businesses	TBC	25% increase?

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



National Festival of Making, Blackburn

OUR HEADLINE 'PLAN ON A PAGE'

(S,M,A,R,T identifies how each initiative connects to the SMART approach)

PRODUCT DEVELOPMENT	PRODUCTIVITY	SUSTAINABILITY
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 sustainability of the sector (environmentally, financially and socially) 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	Target media familiarisation visits from priority markets and publications related to thematic strands. M	Develop a long-term research programme that will provide greater insight on visitor characteristics and perceptions. T
Develop thematic narrative – stories, interpretation, content – and visitor focused itineraries. R	Deliver year-round promotional campaign activity, utilising digital innovations to increase reach and trackability. T	Review training and skills needs to strengthen the workforce pipeline, upskill re use of technology and digital content and activate workers as ambassadors. T
Create bookable experiences for multi-channel distribution. T	Build on Discover England Fund projects to reach international audiences. A	Create a targeted business support programme that focuses on innovation and diversification to generate sustainable investment and growth. R
Work with the travel trade to package appropriate itineraries for different audience segments. A	Develop a co-ordinated approach to attracting groups to Lancashire. A	Ensure culture and tourism play a major part in place-making initiatives, particularly those connected to Town Deals and Future High Street Funds. M
Develop a rounded green/sustainable tourism offer and support the sector with a roadmap to Net Zero. S	Establish a conference ambassador and bidding programme working closely with Lancashire universities. M	
	Focus on waste reduction and the use of technology to improve productivity. S	
KEY STAKEHOLDERS	KEY STAKEHOLDERS	KEY STAKEHOLDERS
<ul style="list-style-type: none"> 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/Arts Lancashire/ LMF/MBP/LWT/RSPB) VisitEngland/VisitBritain DCMS 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 VisitEngland/VisitBritain BEIS, DCMS and MHCLG



Northcote, Langho

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 here 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:

- £125m Eden Project, Morecambe
- Showtown - Museum Project, Blackpool
- £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)



Eden Project, Morecambe

BUILDING BETTER DEMAND - A PLAN TO EXTEND THE REACH AND BENEFIT OF LANCASHIRE'S VISITOR ECONOMY

- £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
- £17.9m for Rossendale investments into Rawtenstall and Bacup
- £12m St Annes Sea Wall and Promenade redevelopment
- £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
- £3.2m Fleetwood Market improvements
- Bacup, Burnley, Fleetwood, Kirkham, Lancaster and Ormskirk High Street Heritage Action Zone investments
- Multi-million pound investment in 'Valhalla' at Blackpool Pleasure Beach
- £45m indoor attraction Adrenaline World, Stanley Park Blackpool
- £21m extension to Houndshell 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
- Eco Escapes and 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. There are also a number of new infrastructure and facilities developments taking place across the county, including sustainable 'active travel' initiatives and the plans for HS2 linking with Preston and Lancaster, which will help to make these assets accessible to a wide audience.





Singing, Ringing Tree, Burnley

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 further consultation we will create a matrix which will overlay proposed thematic narratives with key assets].

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.



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 Project, Morecambe.
	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.
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.



**A shared
ambition to
build better
demand for
Lancashire**

Light up Lancaster festival

NEXT STEPS

The development of a shared ambition to build better demand, extending the reach and benefit of the visitor economy in Lancashire, is just the first stage of this process.

The successful delivery of this plan will involve the full range of stakeholders identified on page 14, and we collectively need to undertake further work to refine the thematic narratives and to map current and new assets against them. We also need to develop more detailed implementation plans, aligned with those of stakeholders, connected to the 'SMART' approach and with a specific focus on sustainability as a key challenge and opportunity for Lancashire's visitor economy

THANK-YOU

We would like to give thanks to those businesses and organisations that have played a part in the development of this plan, including:

The LEP Tourism, Culture and Place Sector Group

Our Visit Lancashire Partners

Lancashire Business Amassadors

The Marketing Lancashire Board

Visit England

Our local authority stakeholders

Lancashire County Council, Blackburn with Darwen Council, Blackpool Council, Burnley Borough Council, Chorley Council, Fylde Borough Council, Hyndburn Borough Council, Lancaster City Council, Pendle Borough Council, Preston City Council, Ribble Valley Borough Council, Rossendale Borough Council, South Ribble Borough Council, West Lancashire Borough Council, Wyre Council

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Preston Docks

