

Lancashire Visitor Economy Strategy 2015-2020 DRAFT June 2015

Produced by Marketing Lancashire with support from Blue Sail Ltd

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Lancashire Visitor Economy Strategy 2015-2020

Introduction

The Visitor Economy of Lancashire is one of 7 key business sectors that the county has identified as a provider of jobs and wealth in the future. It currently represents 7% of the county's GVA, employing 1 in 10 of the working population who service 63 million visitors a year.¹ The economic impact of these visitors is £9.3m a day, or £3.5bn a year. Its value has grown by 10% since 2009.

This strategy outlines how the county intends to support future growth over a 5 year period to 2020. It is accompanied by a destination management plan that provides a more detailed set of priorities and an action plan for all the stakeholders in the county.

The impact of Lancashire's visitor economy is valued at £9.3m per day

Visitor Economy vs Tourism

This strategy is deliberately called a visitor economy strategy. This is because for Lancashire 'tourism' tends to describe a narrow set of services and facilities - accommodation, attractions and activities. In fact visitors use a much wider range of services and

facilities – transport, cultural venues, public facilities such as car parks and toilets, restaurants, pubs, cafes – many of which principally serve local communities. Visitor economy, then, is a term that better reflects the multifaceted, multi-sector nature of the sector and helps local stakeholders to better understand and support its growth.

The Visitor Economy as an Economic Driver

Lancashire's visitor economy is recognised as a catalyst for change and a creator of wealth. It creates jobs, provides employment and up-skilling opportunities, improves and protects the built and natural environments and creates demand for new and high quality businesses and services as well as better infrastructure and transport networks.

There is a virtuous relationship between the visitor economy and wider economic activity. Experiences that visitors enjoy contribute to a high quality of life, making places that welcome visitors desirable places in which to live, work, study and invest.

Across the UK, the visitor economy creates new jobs fast in both career and entry level jobs. In 2014 ONS estimated that tourism was the fastest growing sector in the UK in employment terms, responsible for almost one third of the net increase in jobs between 2010 and 2013. Nationally over 35,000 new apprenticeships were created in hospitality during 2013.

ONS commented in 2012 that the sector is a significant incubator for entrepreneurs – 22,275 businesses started up in the sector that year. The visitor economy attracts and supports small business entrepreneurs and creates opportunities to diversify and support rural economies and traditions.

Places that welcome visitors are desirable places in which to live, work, study and invest.

¹ Based on STEAM, the economic impact assessment of the volume and value of tourism 2014.

The visitor economy delivers inward investment in hotels and attractions and it creates and sustains demand for restaurants, distinctive shopping experiences and cultural venues that are also enjoyed by local communities. As well as its own direct supply chain it supports other local supply chains including the creative sector, agriculture, food production and the construction industry.

Destination marketing creates the platform to support the wider economy, communicating the quality of life, the opportunities for investment, employment and entrepreneurship, on a regional and national stage. It is also often at the forefront in creating a sense of place helping a location to differentiate itself from competitors and stand out from the crowd. Lancashire's LEP has recognised a lack of

The impact of growing Lancashire's visitor economy will be to create more jobs and wealth in the county

positioning and effective marketing and have responded by commissioning a project, led by Marketing Lancashire, to deliver a new strategic marketing proposition for the county that will increase the county's appeal to potential visitors, businesses and investors in growth sectors.

This impact of growing Lancashire's visitor economy will be to create more jobs and wealth for Lancashire; but it will reach much wider than that. It will also make a major contribution to providing services and facilities that will benefit local communities and raise their quality of life.

Strategic Context

Lancashire's visitor economy strategy describes how the county is planning to create economic success through tourism between 2015 and 2020.

It exists in a national context as Lancashire's statement of how it will contribute to the Strategic Framework for Tourism in England 2012-2020. The national framework is currently undergoing a mid-term review and the revised draft suggests 3 objectives and 5 priorities for future growth. The priorities for growth are:

Strategic Framework for Tourism in England Priorities

1. Investing in tourism products and experiences in line with market trends and strategic needs
2. Attracting and retaining motivated people and developing their skills
3. Increasing the visibility and understanding of England's tourism offer
4. Overcoming barriers to business competitiveness and investment
5. Investing in the infrastructure and environment on which tourism growth relies

There are clear links throughout this strategy to the national framework www.visitengland.com/biz/tourism-england/refreshing-growth-strategy-englands-tourism-industry/growth-priorities . The links are important in order to position Lancashire as one of England's primary visitor destinations and a credible potential recipient of support and investment from central government.

At the county level, the visitor economy sits alongside other key business sectors that have been identified by the Lancashire LEP as major employment sectors,

The visitor economy has been identified by the Lancashire LEP as one of the sectors with the best prospects for growth

including aerospace; advanced manufacturing; energy and environment; digital and creative; professional and business services and food and drink.

Recent investment of a significant scale demonstrates the importance that the county’s local authorities place on the visitor economy: £100m to produce the new Blackpool tramway, £40m of public realm improvements in Preston town centre, and £25m on improving the Cathedral quarter in Blackburn are just a few of the schemes that are completed or underway.

The county has been successful in securing investment from national funding programmes such as the Coastal Communities Fund that is putting almost £1m into developing cycling experiences, improving the welcome for visitors and supporting events in the Morecambe Bay area; the Heritage Lottery Fund helping to restore Lytham Hall with a £4.5m grant; £1.2m from the Sustainable Transport Fund is helping to develop cycling facilities in the county and £2m funding from Arts Council England is helping to transform the canal corridor through Pennine Lancashire as part of the Super Slow Way project.

Private sector investment has increased as the business community signals its growing confidence in the country’s future

In recent years, private sector investment has increased as the business community signals its growing confidence in the county’s future. £15m invested in Blackpool Pleasure Beach, £3m in the new Illuminasia experience, upgrades at the Preston Marriott, new ownership and investment for Preston’s Guildhall and a range of restorations and developments in smaller properties and heritage properties are developing Lancashire’s tourism offer.

Lancashire today

Lancashire is not as well known for its inland countryside as it should be. The Forest of Bowland AONB and Bowland Fells and the rural showcase in the Ribble Valley across to Pendle Hill, that draw people into the county are of a quality that puts them on a par with the best in the country as destinations for walking, cycling, good food and drink sourced locally, visiting country villages and towns. Similarly Lancashire’s inland waterways, such as the Lancaster and Leeds to Liverpool canal, are an underutilised and relatively unrecognised asset that provide great experiences for visitors and have the potential to attract more.

Lancashire is not as well known for its inland countryside as it should be

A seaside resort for decades Blackpool has retained its place as England’s most popular seaside destination, famous for its tower, illuminations, entertainment and as the internationally recognised home of ballroom dancing. After a period of decline Blackpool is reinventing itself and has embarked on a programme of investment in its facilities, services and accommodation stock and has recently launched a new national promotional campaign, Blackpool’s Back. The resort sits centrally in a 137 mile coastline that is visited for its tranquillity, beauty and opportunities for engaging with nature. The Arnsdale and Silverdale AONB and the wider Morecambe Bay area is highly valued by visitors who like to relax and refresh themselves in the area and pursue activities such as cycling and walking. The Fylde and Wyre coastlines though less developed are dotted with seaside towns and villages that attract visitors for days out and family holidays as well as hotspots of national excellence such as championship golf in Lytham St Anne’s.

At the upper end of the county sits the historic county town of Lancaster, a small city with a built heritage that puts it in England’s top flight, potentially. Like most similar cities its university is

important to its development and promotion. As the heritage centre of the county, with its Georgian roots evident in its architecture, it is a place that provides a quality environment for people that like history, independent shopping and cultural experiences. It is one of the county's biggest opportunities for growth.

Lancaster, a small city with a built heritage that puts it in England's top flight, potentially.

Preston is the administrative heart of the county and is undergoing a major transformation through the City Deal agreement and UCLAN's £200m Masterplan. It has significant potential as a hub for business tourism and because of its transport links North South, just 2 hours from London, it is an important orientation point for visitors to the county.

Like most of England, Lancashire suffers to some extent from seasonality, though this is more acute in rural and less developed coastal areas than in the urban centres and resort hotspots. The county's main season begins at Easter and draws to a close at the end of August, with additional peaks in the school half terms. In recent years the industry has focused on providing reasons to visit the county at Christmas and there is potential to develop the festival period to drive business at a traditionally quieter time.

Events are a tried and tested way to both position and promote a place and Lancashire has a growing programme with many concentrated in the main season. Those with the highest profile are: Blackpool Air Show, the Illuminations and annual Switch On Event, Fleetwood Festival of Transport, Vintage By the Sea, Clitheroe's Food Festival and the Lytham Festival while a plethora of smaller festivals are enjoyed by visitors who discover them by chance and leave the county feeling that they have had an authentic Lancastrian experience.

In terms of its services and facilities, the county has some outstanding businesses that are award winning and popular. For example the Freemasons at Wiswell, Clitheroe received the gold award for Tourism Pub of the Year at the national tourism awards, and the Woodland Spa won Global Spa of the Year and Best Emerging Spa at the Luxury Spa awards in 2015. In the North West, Blackpool is second only to the Lake District in terms of consumer's consideration for a visit. It also performs well against other resorts coming second to Bournemouth in appeal among consumers nationally. That said, there are areas for improvement, particularly in the quality of its accommodation stock, the range and quantity of accommodation that visitors can choose from and urban centres that need upgrading.

Public/Private Partnership

The county's visitor economy comprises hotels, B&Bs, self-catering properties, camping and caravanning sites and hostels; museums, farms attractions, theme parks and cultural venues; activities such as riding, fishing, water sports, walking and cycling; pubs, restaurants, cafes, shops and events. This brief list serves to illustrate the complexity and diversity of the sector. It also illustrates that it involves hundreds of businesses from sectors that that wouldn't automatically associate themselves with tourists. The majority of these services and facilities (though not all) are provided by the private sector.

The public sector provides services and facilities that are equally important to the visitor: transport, car parks, toilets, clean streets, seating, signage, cultural venues, events and information. Additionally local authorities and public sector agencies have significant influence on the visitor economy through their policy, planning and service delivery.

No one can deliver a successful visitor economy on their own. Partnership is essential.

The visitor economy touches on nearly every aspect of the day to day life of a place. It is self-evident, therefore, that no one organisation, individual or business can deliver a successful visitor economy alone. Partnership is essential. Yet with a county as large and diverse as Lancashire, partnership cannot be taken for granted. Proactive collaboration between the 15 district, unitary and county councils is necessary to the coordination of public-sector driven development and promotion. The private sector must come together to share intelligence, pool resource and support county-wide messaging and marketing. Public and private sectors must work hand in hand to avoid duplication and provide clarity, both in terms of investment and promotion. As money, time and resources become increasingly scarce, working together is not an option but a necessity.

Lancashire's Vision

Based on in depth analysis of Lancashire's product strengths, its existing visitor profile and an analysis of future opportunities, the vision for Lancashire as a visitor destination by 2020 is:

- To be recognised as one of the top 5 English counties for a refreshing and relaxing short break and an active family holiday.
- To be known nationally as a culinary 'must visit destination' because of the authenticity and quality of its food and drink, from field to table, locally sourced from the county's stunning valleys, plains, woodlands and coasts.
- To be a preferred location for corporate events and association conferences because of the choice and value for money of its venues and the breadth and depth of the business tourism infrastructure.
- For the county's cultural offer, centred on Lancaster and key annual events, to be one of the main reasons that visitors choose to visit Lancashire.
- To be recognised for its stunning 137 mile coastline that effortlessly combines seaside heritage and contemporary leisure experiences and is centred on England's favourite resort, Blackpool.
- A destination that offers outstanding customer service on a par with the best worldwide and is an example of best practice in offering accessible holidays.

Lancashire's Objectives

The county's objectives are based in part on past performance and in part on the potential offered by its product strengths. They are realistic but stretch.

The objectives for Lancashire's visitor economy by 2020 are²:

- To attract an additional 6.3m visitors
- To achieve a ratio of 80:20 between new day and staying visits: 1.3m additional staying visitor and 5m additional day visitors
- To deliver an additional visitor spend of £650m
- To support an additional 5000 jobs

Lancashire's Strategy

The approach to growing Lancashire's visitor economy can be summarised as: evidence-based, customer focused, and built on the principles of sustainability (WISE growth).

We will lead with our product strengths to attract people to the county and target investment to fill our product gaps so that in the future we appeal to a broader set of audiences. We will focus promotional activity on people that will like what we have to offer (target segments) and, where it makes sense, work with partners to make our resources stretch as far as possible. We will seek to ensure that the needs of businesses, visitors, the community and the environment are balanced so that growth is achieved in a way that is acceptable to all. We will also ensure that destination marketing and visitor economy development leverages and supports the emerging county brand to increase our profile at home and abroad.

The Evidence Base

Investment, development and promotion will be based on evidence; this will ensure good decision making and give us the best chance of success. This strategy is based on evidence drawn from a range of sources: economic impact assessments, visitor surveys, and consumer segmentation and sector studies. It is also based on a programme of research looking at national visitor trends, the national and international context for development and an in-depth audit of Lancashire's offer.

Investment, development and promotion will be based on evidence; this will ensure good decision making

We will continue to invest in the existing evidence base and over time fill gaps, for example in visitor perceptions and sector studies, to ensure that we can measure future success. We will also ensure that we know and understand our customers (visitors) so that we develop in a way that will attract more people to visit and, when they are here, ensure we meet and exceed their expectations, securing them as ambassadors for the county.

WISE Growth

Adopting the principles of WISE growth³ means that our strategy is overtly concerned with protecting Lancashire's natural and heritage assets far into the future. This is critical because these assets are what attracts people to visit the county.

² Figures are provisional and will be finalised before this strategy is published

³ A fuller definition of WISE growth is provided in the appendices

WISE growth also means that we will actively seek to balance the needs of community, environment, business and visitor so that no one dominates or overrides the other. Putting WISE growth into practise means involving a wide range of stakeholders in decision making including local communities.

Sustainable growth doesn't mean that we seek to limit the volume of people coming to spend time in Lancashire; we are in fact planning to increase the volume of visitors by 10% over a five year period, welcoming an additional 6.3m visitors each year. What it does mean is that we will be proactive in balancing volume and value.

We will actively seek to balance the needs of community, environment, business and visitor

Lancashire currently attracts many more day than staying visitors - almost 9 out of 10 visit for the day. Yet on average staying visitors spend five times more. They also use more services and more sustainable forms of transport particularly during their visit. Our approach therefore is to grow overall numbers but adjust the ratio between staying and day. We will aim for more overnight visitors. This will increase the value of the visitor economy and spread the benefit as widely as possible.

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Customer Focused

Using our evidence base, we will prioritise development and promotion on the needs and expectations of our visitors. Our aim is to attract more people to visit and when they are here give them a great experience, so that they recommend Lancashire and return in the future.

Being customer focused means understanding who visits the county currently and also, who we want to attract in the future. Lancashire's customers fall into three broad segments⁴:

Independent Explorers - a group that contains lots of families with children aged 7-14 and people over 30 that travel with groups of friends. They take multiple short breaks and spend their money on attractions, activities and accommodation. They plan in advance to some degree and are keen on insider tips. They are also interested in food.

Connoisseur searchers - people that travel as couples and with friends and are age 35+. They take regular leisure breaks, UK and overseas, and are therefore well-travelled and have high expectations. They look for quality and authentic experiences which are a strong motivation to visit.

Entertainment Seekers- a group that contains many families but also groups of friends. They are looking for fun and entertainment. They like to plan ahead, take trips around special occasions and are motivated by events and big names.

Going forward we will invest in the products that these groups of people are most interested in. We will also ensure that we use the right messages and marketing channels to reach them so that they put Lancashire on their 'must visit' list.

⁴ Lancashire's segments have been identified and described by Blue Sail. More information is provided in the appendices.

Ease of access and duration of travel can be important deciding factors for visitors. As well as being clear about who we are aiming to attract, we will focus our promotion on areas of the UK where there are good transport links with Lancashire and in areas from which we already draw visitors.

We currently draw the bulk of our visitors from the North West, Yorkshire, and the West Midlands and we will continue to promote Lancashire in these areas. In addition we will target people from our priority segments that live further away in the large population centres of South East and Western Scotland. We already draw 16% of our visitor from these areas. By positioning Lancashire as a short break destination with people that are slightly further afield we are more likely to achieve our ratio of 2 in 10 first time visitors staying overnight.

Partnerships

We can increase the volume and value of visitors to Lancashire by working in partnership and at the same time ensure that our resources go as far possible and work as hard as possible.

Within the county collaboration between landscape management bodies such as the AONB and the Morecambe Bay Partnership and cultural partnerships such as Arts Lancashire and Creative Lancashire has shown how everyone benefits when they link up and pool knowledge and resources.

In domestic marketing, working with partners will bring us to the attention of more consumers than we could reach on our own. Working with train operators, particularly Virgin, to raise the profile of Lancashire and highlight the ease of access into the county from London, the South East and Scotland will increase our reach into locations that we want to target.

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The county has natural affinity with places that have similar product. For example, Lancaster is perfect partner for England's Heritage Cities. We are able to work as a member of this consortia to position Lancaster alongside high profile destinations that have national and international appeal such as including Bath, York, Oxford and Cambridge.

Lancashire is fortunate in having two strong business tourism destinations close by. Both Manchester and Liverpool are major centres for corporate and association conference businesses. We can work with them to improve our knowledge, develop our skills and also win business for our existing and emerging conference locations.

Partnership is particularly important for international marketing. International promotion is prohibitively expensive for the county to go it alone. It is also difficult to make an impact as a single English destination when overseas visitors are unlikely to know much about the country. Working with others to grow the volume of international tourism to England and then positioning Lancashire favourably within the England offer is a pragmatic and sensible approach. Nationally managed programmes such as the Northern Tourism Growth Fund are examples of vehicles that Lancashire can use to its advantage.

Manchester International Airport, John Lennon Airport and the Port of Liverpool are the North West's international gateways. Developing partnerships with these gateways is another way to increase Lancashire's international profile.

In terms of product development, we can achieve more by working with neighbours, particularly where we share landscapes across administrative borders. Morecambe Bay is an example where Lancashire and Cumbria have worked together to create an outstanding environment that attracts visitors.

Positioning the county nationally and internationally to attract investment and talent adds credibility and weight to visitor marketing

Leveraging the County Brand

The emerging Lancashire brand offers a real opportunity for destination promotion. Positioning the county nationally and internationally to attract investment and talent adds credibility and weight to visitor marketing. Equally destination marketing provides a strong platform from which to attract more people to the county live, work and study as well as visit. The Lancashire brand will produce a clear statement of the county's assets, values and attributes and a set of compelling messages, elements of which will be incorporated into the county's destination marketing plan.

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Promoting strengths

Auditing and research has revealed that Lancashire has considerable strengths. Much of its product is well developed and the county provides high quality and memorable experiences for visitors. In the immediate future we will use these strengths to promote the county and attract new visitors. Our strengths are:

- inland and coastal landscapes including ancient woodland, tranquil waterways and open plains;
- our entertainment hub at Blackpool;
- a quality rural showcase in the Ribble Valley and Forest of Bowland;
- the heritage city of Lancaster
- a growing programme of events, some with national potential;
- a wide range of outdoor activities, particularly the range of cycling experiences for all ages and abilities, and hotspots of excellence such as championship golf in Lytham St Anne's
- an emerging business tourism offer at Preston to compliment the revival of Blackpool as a significant conference destination;
- Our universities as a driver of the visiting friends and relations market
- good North/South connections, both road and rail, as well as proximity to the international gateway of Manchester International Airport and other regional airports and ports
- the range and depth of quality food producers and eateries sourcing locally

The county provides high quality and memorable experiences for visitors

Maximising opportunities

In the medium term we will invest in product, programmes and partnerships that already exist and offer good opportunities for growth but also need development:

- arrival points and gateways to provide a better welcome and a stronger sense of place;
- accommodation, facilities and experiences for people with accessibility needs;
- flexible, accessible and customised training programmes and business advice particularly for small tourism businesses;

- partnerships between the tourism industry and Lancashire's three universities, Edge Hill, UCLAN and Lancaster, to grow business tourism and maximise the value of the visiting friends and relations market;
- deliver the Skills Action Plan to address skills and employability issues within the sector;
- Lancashire's centres of excellence to grow a hospitality workforce for the future that will provide outstanding customer service;
- cultural tourism for Lancashire, defining what it means for the county and how it could be used to attract more visitors;
- support investment by seeking additional resources through relevant funding streams including the European Structural Investment Fund (ESIF) programme.

Meeting challenges

Like most destinations in England Lancashire has its challenges. Over the longer term we will address issues that we know need tackling and any that are identified as we gain better understanding of the needs and expectation of our visitors. Alongside some quick wins, some of our challenges will take longer to solve because, for example, they have a long lead in for planning, require high investment or take several years to change. They include:

Alongside some quick wins, some of our challenges will take longer to solve

- quality of the accommodation base;
- quantity and variety of the accommodation base in specific areas;
- new business-oriented accommodation and venues;
- skills and employability issues;
- weak public transport and outdated rural road infrastructure east to west
- lack of profile, particularly at a national and international level
- lack of clarity about what the county has to offer and strong messaging to consumers.

Future investment and resourcing

Investment in the visitor economy will come from a variety of sources. Nationally, the proposed Visit England Challenge Fund may offer an opportunity to attract investment to develop our product, particularly if we can find partners to work with.

LEP investment in developing the Lancashire brand as well public and private sector investment in the work of Marketing Lancashire will help the county deliver some of the coordination, market intelligence and marketing activity that is needed. Working pan-Lancashire will help to secure investment in the visitor economy, for example working with national bodies such as the Arts Council England and English Heritage to make a stronger impact and deliver projects on the ground.

Sources of public sector investment such as the Growth Deal, European Social Investment Fund, and the Rural Development Programme for England will be important for Lancashire to realise the potential of its product as will private sector investment in the services and facilities that visitors rely on.

Crucially, this strategy and its accompanying destination management plan sets out a clear set of priorities for everyone in the county to focus on. Being clear where investment is needed and ensuring that money is invested in a focused way will produce more jobs for local people and create wealth for Lancashire and its communities.

Delivering the Strategy

All stakeholders in the county, both public and private, are involved in delivering this strategy

The strategy is accompanied by a destination management plan (DMP) that sets out a series of priorities and actions that will contribute to achieving our aims and objectives. The DMP will help all stakeholders focus their attention, time and investment into activity that will make a difference. It is an action plan that the whole county can implement.

Marketing Lancashire is the county's agency that will manage and monitor delivery of the DMP and support partners to play a proactive role.

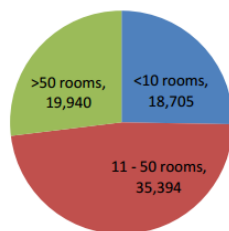
Appendices

1 Summary of Lancashire's visitor economy

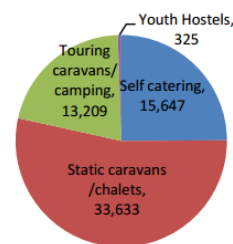
Bed stock

Lancashire has 3000 accommodation establishments providing approximately 137,000 bed spaces. 54% of the bed spaces are in serviced accommodation and 46% in non-serviced.

Serviced accommodation bedspaces



Non-serviced accommodation bedspaces



The bed stock is not spread evenly across the county. 74% of serviced accommodation is in Blackpool. 70% of non-serviced beds are spread between Blackpool, Lancashire and Wyre (the coastal area to the south of Blackpool)

Attractions

There are approximately 57 attractions in the county⁵ of which just over half (30) are paid for. The top ten paid attractions are:

Blackpool pleasure beach	7.8m
Blackpool Sandcastle Waterpark	331,138
Martin Mere Wetland Centre	179,166
RSPB Leighton Moss Nature Reserve	113,867
Rufford Old Hall	51,111
Towneley Hall Art Gallery & Museum	50,000
Williamson Park	33,678
Bowland Wild Board Park	30,000
Gawthorpe Hall	26,126
Lancaster Maritime Museum	13,969

The top ten free attractions are:

Avenham and Miller Park	708,100
Beacon Fell Country Park	250,000
Worden Park	250,000
Harris Museum and Art Gallery	212,131
Brockholes (Nature Reserve)	154,465

⁵ Source: Internet Research undertaken by Blue Sail; Survey of Visits to Visitor Attraction, 2013, Visit England

Carnforth Station and Visitor Centre	50,000
The Museum of Lancashire	34,668
The Solaris Centre	30,600
Longton Brickcroft Nature Reserve	30,000
World Horse Welfare Penny Farm	25,000

NB: these lists are compiled from available data. Data is not available for many of Lancashire's paid attractions and in particular those in Blackpool. Their visitor numbers are likely to put them in the top 10 list.

Of the 57 attractions:

13 are museums

12 are family oriented attractions eg theme parks, zoos and farms

9 are historic houses or castles

The rest are spread across a range of categories from nature centres and gardens and to craft centres and educational oriented attractions such as science and ecology centres.

Outdoor assets

8 National cycle routes pass through Lancashire. There are 10 locations where designated mountain bike trails are available including red and black runs. The Adrenaline Gateway at Rossendale hosts championship events and facilities at Rivington Country Park near Chorley were the venue for the 2002 Commonwealth Games outdoor cycling events.

There are seven long distance walking routes in the county including the 137 mile footpath following the whole coastline between Merseyside and Cumbria, and the Lancashire Witches Way between Barrowford and Lancaster Castle.

Lancashire has 240 miles of bridleways. The main ones are the Pennines Bridleway part of a long national trail, the West Pennines Moors Bridleway, the Mary Towneley Loop between Rochdale, Burnley and Hebden Bridge and the North Lancashire Bridleway in the Ribble Valley.

There are 6 water sports centres and 10 sailing clubs in the county plus 8 fisheries that offer a range of types of fishing from course fishing to pike fishing.

The county has 18 nature centres and 6 sculpture trails.

Outdoor events

The county stages an enormous range of events each year. From vintage seaside to walking and cycling festivals, from festivals celebrating our canals and industrial heritage to venue based events including circuses, comedy festivals and science events, the county has a very full programme. The table below summarises the main events that attract visitors from outside the county because of their size, longevity and reputation. More can be found at visitlancashire.com/whatson.

Blackburn Heritage Festival	Fleetwood Festival of Transport
Blackpool Air Show	Garstang Show
Blackpool Illuminations Switch On	Lancaster Music Festival
Blackpool Tower Circus	Lytham Festival
Catch the Wind Kit Festival Morecombe	Royal Lancashire Show
Clitheroe Food Festival	Vintage By the Sea Festival

2 Visitor profiles

Independent explorers

Overview - Families with children aged 7-14, couples and groups of friends aged 30+. Living in North West England or Yorkshire within 60-90 minutes travel time. Open to new things and with lively and enquiring minds. Lead active, busy lives; engage in sporting, cultural and social activities. Take regular breaks in the UK and main holidays overseas. Socio-economic groups BC1C2.

On holiday - Looking for new places to visit and discover – especially off the beaten track. Tend to keep on the lookout for quality family time together. Couples and friends want to get away from it all and enjoy each other's company. All looking for soft to moderate activities – walking and cycling, enjoying lovely places and attractive towns and villages to wander around and photograph; authentic experiences; quality attractions, meeting local people. Stay in quality B&Bs, independent hotels, camping, glamping and self-catering. They do some planning in advance so require good quality information. Also look for information and 'insider tips' after they arrive. They spend in-destination on food, accommodation, visits to attractions, activities. They tend to travel using their own car.

Rational for selection - Good product fit. Relatively high-spending. Couples and groups particularly take multiple-short breaks and will return for different types of trips (eg anniversaries, multi-generation trips, activities). Families will be looking for thing to do together – activities, wildlife watching, heritage – may be open to a day trip to the season for fun and entertainment. Will have visited the Lake District, North Wales and Yorkshire already and be looking for something similar but new. Recent investment in Brockholes, cycling in Morecambe Bay and the event and performances in Blackpool and along the coast are all relevant. Lancaster city will be a good hub and Preston could be a base for the southern part of the Ribble Valley with its good value budget hotel brands.

Connoisseur searchers

Overview - Couples and friends 35+ through to 60s. Affluent, higher socio-economic groups, well-educated and well-travelled. Senior professionals, and business owners. At upper age range some newly retired. Cosmopolitan, cultured, rich social lives. Very interested in food: eat well at home and dine out frequently. Know what's happening on the food scene. Living in Manchester, Cheshire, York, Harrogate and affluent rural locations within 2 hour drive time.

On holiday - Take regular leisure breaks to spend time together - UK and overseas and often inspired by a particular experience - eg visiting a new restaurant, cultural event or festival. Opportunities to 'delve deeper' - and be intellectually as well as emotionally stimulated. Like stories and connections. Enjoy meeting the experts - producers, chefs, etc. High quality aesthetics. Authenticity. Something new. Looking for quality accommodation - independent hotels, guest houses and B&Bs; restaurants with rooms. Enjoy browsing in pretty villages and towns.

Rationale for selection - Good product fit, high-spending, discerning. Can and will travel off-peak. Take multiple short breaks and always looking for something new. Inspired by new ideas - including off-the-beaten track, non-mainstream - so will support smaller independent places and will travel beyond the honeypots. Destination restaurants and food retailers in Ribble Valley are the sort of

thing they look for, with quality characterful accommodation. The cultural heritage and history of Lancaster city makes it a significant attractor; and further investment in East Lancs heritage will extend this area's appeal. Coastal areas of Wyre Valley or independent shops in Lytham St Anne's and elsewhere will also appeal. Festivals work well for this segment. While perhaps not looking for serious activity, scenic walks would be of interest - e.g. in Ribble Valley, Lune Valley or on the coast.

Entertainment seekers

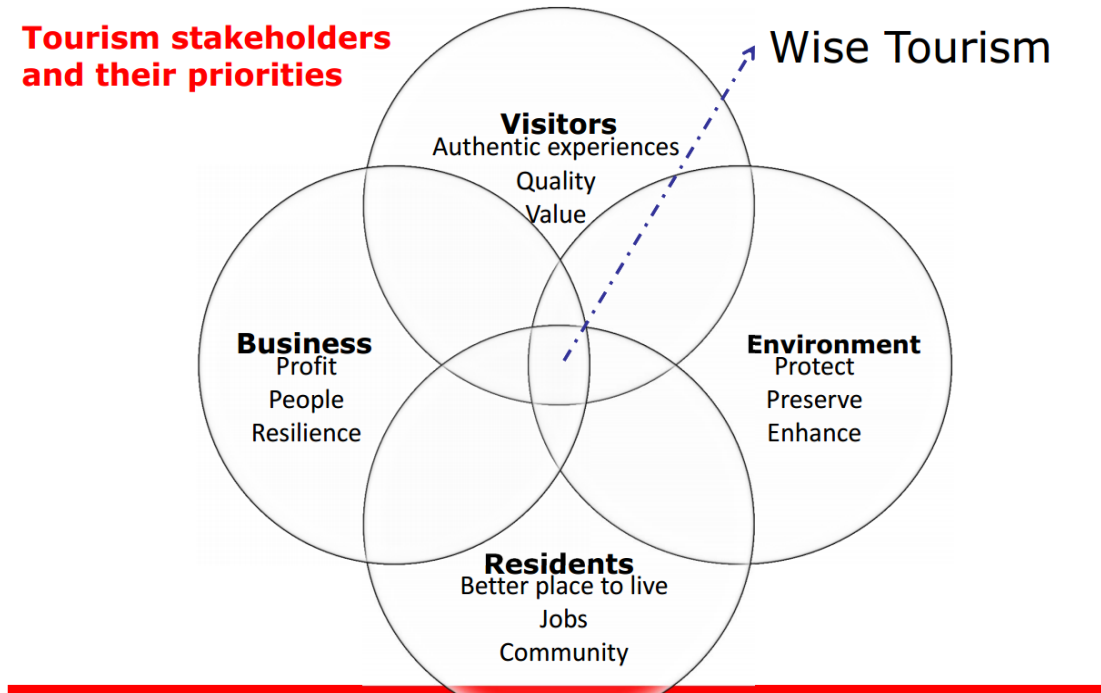
Overview - Groups of friends, families and couples. Looking for entertainment, fun and a good time. Living in North West, central Scotland, and West Midlands. Enjoying socialising and leisure activities - cinema, shopping. Mainstream views and traditional outlook on life. C1C2 socio-economic group. All age groups. Like to know what to expect and be comfortable with it; not particularly motivated by new experiences. High propensity to repeat.

On holiday - Take a number of breaks each year, including an overseas main holiday. Like to plan ahead and often take trips around special occasions. Are motivated by particular events in the destination. Stay in hotels and B&Bs. Happy to spend on entertainment, attractions and shopping. Enjoy resorts and all inclusive deals. Like everything to be on tap and easy to access

Rationale for selection - Good product fit for Blackpool. High propensity to repeat once they find somewhere they like. Prepared to spend to enjoy themselves. Attracted by Blackpool's fun and entertainment including events and performance. May have visited as a child and be up for a nostalgic visit and rediscovering. Big name shows and events will attract. New developments and investment in Blackpool can be used to attract new and lapsed visitors within these segments and will be essential to growing the market.

3 Principles of WISE growth

A WISE growth strategy for tourism is one which integrates the economic, social and environmental implications of tourism and which spreads the benefits throughout society as widely as possible. WISE growth seeks to keep the priorities of stakeholders in balance. In Lancashire the Forest of Bowland is being developed along these principles.



4 Supporting documents and reference

There are over 70 frameworks, plans and strategies in Lancashire that reference the county's visitor economy and which contain recommendations and actions that potentially impact on the county's future success as a visitor destination. Below is a list of the main documents that have been used in the creation of the Lancashire's Visitor Economy Strategy. A full list is provide online at:

NATIONAL

The All-England Destination Marketing Strategy: A New Approach, Visit England
Government Tourism Policy Department for Culture, Media and Sport, March 2011
The National Planning Policy Framework and national planning guidance (NPPF), The Department for Communities and Local Government, (tourism relevant sections)
A Strategic Action Plan for Tourism, Destination Management Action Plan, 2010-2020, Visit England
A Strategic Action Plan for Tourism, Resorts Action Plan, 2010-2020, Visit England
A Strategic Framework, for Tourism 2010-2020, (Revised edition 2011), Visit England

COUNTY

Adopted Central Lancashire Core Strategy July 2012
The Culture and Sport Strategy for Lancashire 2010
EU Structural and Investment Funds Strategy for Lancashire 2014-20
Lancashire Growth Plan 2013/14
Lancashire's Key Employment Sectors (relevant extract)
Lancashire West Local Development Strategy
Lancashire Strategic Economic Plan, A Growth Deal for the *Arc of Prosperity*, March 2014
Local Transport Plan, 2011 – 2021 - A Strategy for Lancashire, May 2011

SUB-COUNTY

Core strategies and local plans for Blackburn with Darwen, Blackpool, Burnley, Chorley, Fylde, Hyndburn, Lancaster, Pendle, Preston, Ribble Valley, Rossendale, South Ribble, West Lancashire, Wyre.
Cultural Framework for Preston, 2014-2018
Destination Branding Strategy for Lancashire District, August 2013
Fleetwood Seafront Masterplan - a Delivery Framework, July 2009
Fylde Coastal Master Plan, Draft Version 1.4, Fylde Council, March 2014
Heritage Investment Strategy 2015-2020 (draft), English Heritage (with Blackburn with Darwen, Burnley, Hyndburn, Pendle and Rossendale Councils and Regenerate Pennine Lancashire)
An Integrated Economic Strategy for Pennine Lancashire, Proposed Delivery Plan 2009-2012
Lancaster and Bowland Local Development Strategy, Lancashire County Council
Lancaster Cultural Heritage Strategy, March 2011
Lytham St Anne 2020 Vision, Fylde Borough Council
Marketing Blackpool, destination Management Plan, 2012-2015, second edition, June 2013
Pennine Lancashire Cultural Action Plan - Action Plan 2011-2014
Pennine-Lancashire investment Plan
Tourism Strategy for Morecambe, Lancaster and the Lune Valley, 2006-2010

5 Consultation list

Over 70 people were consulted in the course of creating this document.

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