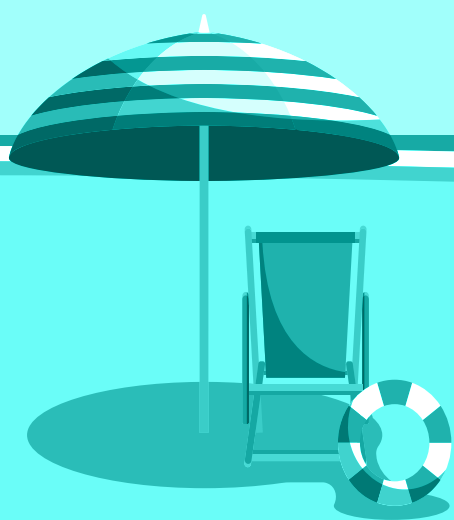


# ST-ANNE'S-ON-THE-SEA

TOWN CENTRE MASTERPLAN: STAGE 3

DESTINATION MANAGEMENT PLAN



AMION CONSULTING  
SEPTEMBER 2022

## Fylde Borough Council

# St Annes Destination Management Plan

A report

September 2022

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# Contents

- 1 Context ..... 1**
  - 1.1 Introduction ..... 1
  - 1.2 What is a Destination Management Plan? ..... 2
- 2 St Annes Visitor Economy Today ..... 4**
  - 2.1 The visitor market - historic volume, value and trends summary ..... 4
  - 2.2 St Annes visitors – their profile, characteristics and perceptions ..... 5
  - 2.3 The current visitor economy offer in St. Annes ..... 8
  - 2.4 Policy context summary ..... 10
  - 2.5 Destination management and organisation ..... 11
  - 2.6 Gaps in the St. Annes offer ..... 12
- 3 Future Plan ..... 15**
  - 3.1 Defining St Annes USP and future vision ..... 15
  - 3.2 Priorities ..... 15
  - 3.3 Target markets ..... 19
  - 3.4 Outcomes and targets – overarching ..... 19
- 4 Action Plan ..... 21**

Appendix A – Supplementary reports

# 1 Context

## 1.1 Introduction

This Destination Management Plan (DMP) has been produced by AMION Consulting on behalf of Fylde Borough Council. It forms part of a masterplan which is being produced for the town<sup>1</sup> and focusses specifically on the development of the visitor offer and visitor economy.

Although AMION are the authors of this report, it is based on research, analysis and consultations undertaken with key Visitor Economy stakeholders in St. Annes. The methodology which informed this report included:

- desk research into the volume, value and characteristics of past visitors to the town, drawing on national data as well as locally commissioned studies;
- desk research and site visits looking at the current visitor offer and infrastructure;
- stakeholder consultations with key visitor economy representatives including business owners, Council representatives and Marketing Lancashire;
- primary research which assessed the profile and perceptions of past and potential visitors to St. Annes;
- a Visitor Economy workshop which explored the research, analysis and emerging findings and reflected on the implications for the DMP; and
- a public consultation exercise which tested responses to a range of masterplan options, including options for a number of key sites which are particularly important to the visitor offer.

This report, therefore, sits alongside the following documents:

- St. Annes visitor economy baseline assessment;
- St. Annes socioeconomic baseline assessment;
- St. Annes visitor economy primary research summary report; and
- St Annes Regeneration Town Centre Strategy and Masterplan Report (due for completion May 2022).

It is important to note that the plan has been produced early in 2022 as the world appears to be emerging from the Covid 19 pandemic – a crisis which had a particularly significant impact on tourism. Whilst some of the outcomes from the pandemic are known at this time (such as the impact that it has had on the economy over the last two years), a number of things remain unknown, including how long it will take for the economy to fully recover and whether there have been any fundamental shifts in consumer behaviour and attitudes to travel. Recent events in Ukraine will clearly have an impact on inflation and the cost of living, with an as yet unknown outcome on the patterns of consumer spending.

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<sup>1</sup> St Annes Regeneration Town Centre Strategy & Masterplan, BDP Team 2022, commissioned by Fylde Borough Council

This plan, therefore, is based on the best intelligence at this time but it recognises that there is a need for flexibility in future planning, to respond to any shifts or changes that are yet to become clear in the coming years.

## 1.2 What is a Destination Management Plan?

VisitBritain (VB) is the national tourism agency, responsible for marketing Britain worldwide and developing Britain's visitor economy. They describe Destination Management as 'a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment'.

A Destination Management Plan (DMP) is 'a shared statement of intent to manage a destination'

- over a stated period of time;
- with defined roles;
- with identified actions;
- with apportioned resources; and
- with measures and monitoring.

The DMP should deliver:

- things that actually happen;
- less wasted effort and money;
- a better experience for the visitor and wider benefits;
- a clear way to assess and monitor the impacts of tourism;
- maintenance of distinctiveness

The DMP is integral to the local decision making process and it requires both engagement and leadership.

This DMP is a step in St Annes' regeneration journey. It looks at where the town is now and where it intends to be as a destination in the future. It identifies what it is that makes the town distinctive and who are its core visitor segments. It sets out the key actions that will be taken to continue to improve the destination, including the interventions which form part of the wider St Annes Masterplan.

Although, as with any DMP, the focus of this document is the visitor economy, in order to be sustainable, all successful destinations need to appeal not only to their visitors but also to their residents and those who come in to work. The recommendations set out in this plan, therefore, have been developed with all of these audiences in mind. It has been commissioned by Fylde Borough Council but it recognises that a visitor economy can only be successful if the public and private sectors work together – each with important roles to play in the development and delivery of the Plan.

*Ashton Gardens*



## 2 St Annes Visitor Economy Today

This section summarises the key points from the baseline study which is appended to this report.

### 2.1 The visitor market - historic volume, value and trends summary

#### 2.1.1 *The national picture*

The long-term trend for UK domestic tourism (the most important market for St Annes) prior to Covid-19 shows that tourism grew by 6.1% from 2010-19.

Within the national picture, tourism remains significant for coastal destinations, providing between 15-20% of direct employment in coastal communities. Whilst seasonality is reducing within coastal destinations, July and August still accounted for 32% of all visits to the coast in 2018.

Some long term trends are clearly impacting on tourism in coastal resorts, including a reduction in the groups and coach markets and a loss of business events being held on the coast. However, alongside this, there is growth in some key markets, particularly the ‘off-peak active market’ – active people aged over 55, travelling in the shoulder months.

#### 2.1.2 *The impact of the Covid-19 Pandemic*

For the two years prior to the production of this report, however, the impact of the global pandemic on the visitor economy has been seismic.

Visit Britain estimates there was an overall reduction of 63% in domestic tourism spending in 2020. For 2021, Visit Britain’s ‘central scenario’ forecasts a range between 61% and 65% of 2019 levels across its volume and value indicators.

#### 2.1.3 *The regional picture*

Regionally (in the North West), growth has been flatter than at national level, with a 1.4% growth in trips and 3.3% in spend between 2010 and 2019.

According to STEAM<sup>2</sup> data, Lancashire’s tourism economy grew every year from 2012 and 2018. Tourism employs 1 in 10 of the county’s working population and accounts for 7% of its GVA.

In 2020, national and local lockdowns resulted in a 70% reduction in day visits and 62% drop in staying visits.

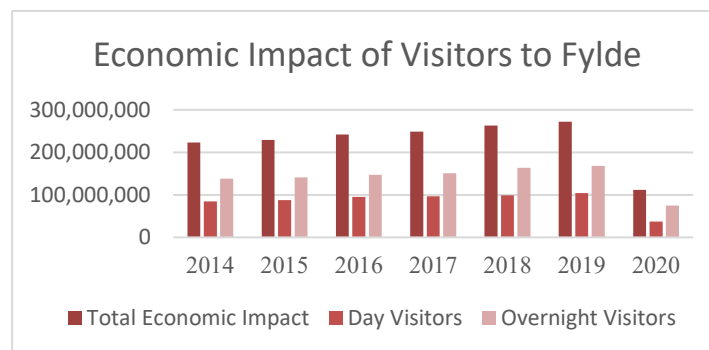
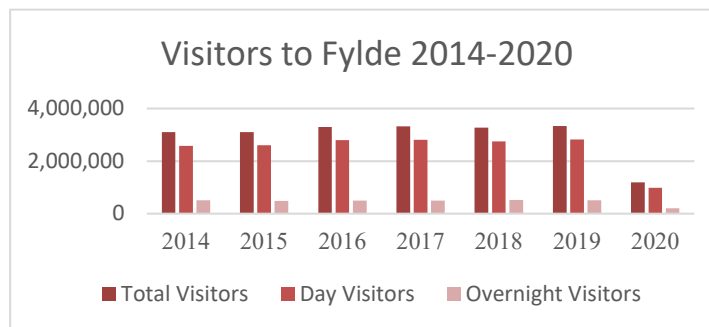
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<sup>2</sup> STEAM research (Scarborough Tourism Economic Activity Monitor) is a model used by many Destination Management Organisations. It uses locally derived data from a variety of sources such as hotels, attractions, tourist information centres, events and accommodation.

### 2.1.4 The local picture

In Fylde, the smallest geographical area for which data is available, overall visits remained relatively static between 2014 and 2019 at approximately 3.3 million. The combined economic impact of staying visitors and day visits, however, has risen steadily. In 2019, the last year before the pandemic, the visitor economy was worth £272m (up 3.2% from 2017), supporting 3,314 FTE jobs.

In 2020, however, Fylde saw a 65.2% decline in day visitors compared to the previous year, recording just 980,000 day visitors. The drop in staying visits was 59%, down to just 210,000, with the majority of visits occurring during the first quarter.



Spend per head (£)	2014	2015	2016	2017	2018	2019	2020
Day Visitors	33	34	34	35	36	37	38
Overnight Visitors	271	290	293	301	317	327	357
All Visitors	72	74	73	75	80	82	94

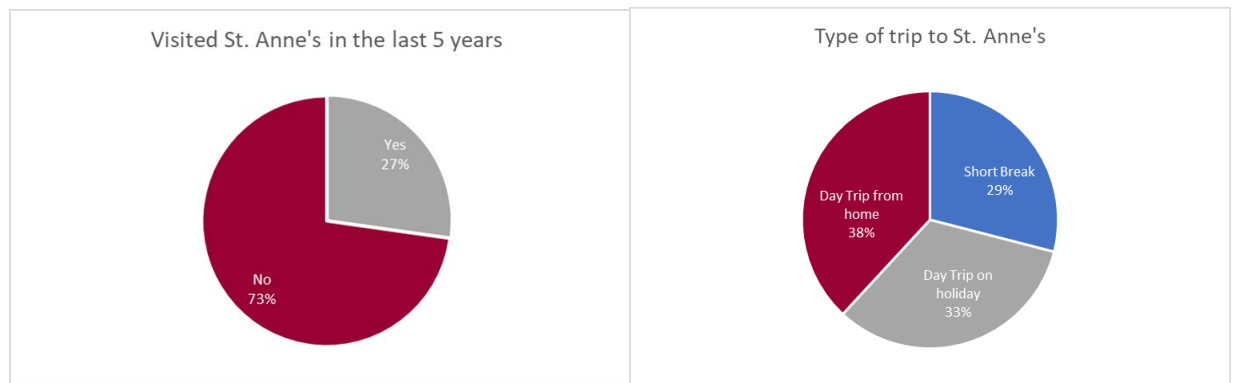
## 2.2 St Annes visitors – their profile, characteristics and perceptions

As part of this study, primary research was conducted using a panel survey of just over 1,000 people living within two hours of St. Annes. The purpose of the study was to assess how many people, living within this primary catchment area, had visited St. Annes for a day trip or overnight holiday and what the perceptions are of the destination. The following summarises the key findings with further details appended to the report.



### 2.2.1 Profile of St. Annes visitors

- Just over a quarter (27%) of people living within the primary catchment area had visited St. Annes in the last five years. Of those who had visited, the biggest percentage had visited on a day trip from home (38%) or a day trip whilst on holiday in the area (33%) although significant 29% (or 13% of everybody polled) had stayed in the destination for a short break or a longer holiday.



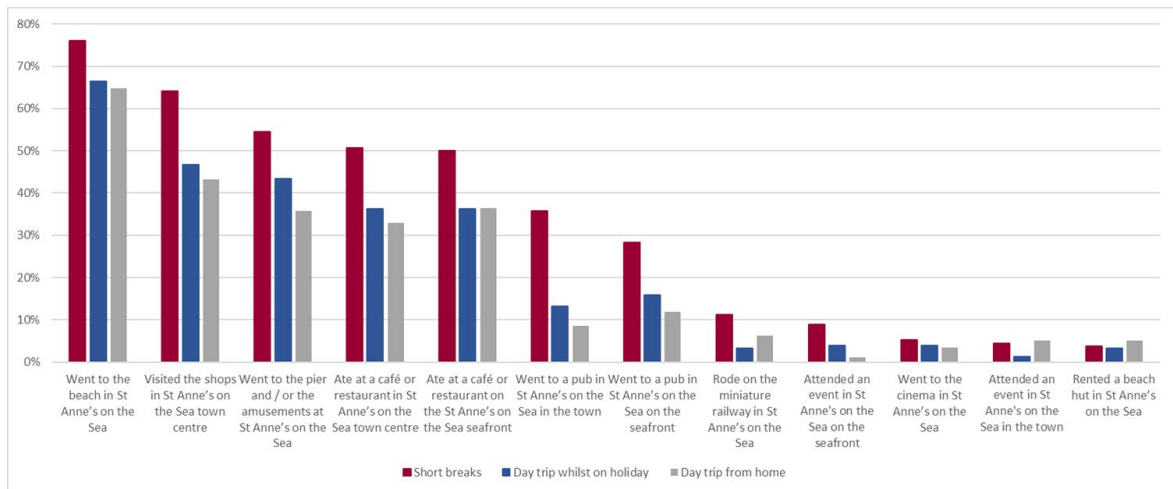
- As a short break destination, St. Annes has a loyal market with nearly two thirds (64%) of past short break visitors making repeat trips. Although the destination has particular appeal to people aged over 55 for this type of trip, adults of all ages have stayed in the resort. Interestingly, St. Annes is a place that people visit both with adult only groups but also with children. 94% of people who had stayed in St. Annes had done so with adult only groups, but 41% had also visited in groups with children. Serviced accommodation was the most popular way to stay, accounting for 71% of staying trips.
- The profile of people who have made day trips from home is very similar. Over two thirds of past visitors make annual trips and whilst they are most likely to be aged over 55, people in the family life stage are also likely to make visits (40%). 91% had visited just with adults, but 45% had also visited in groups with children.
- People making day trips whilst staying in Blackpool is an important market for St. Annes with over half (58%) making at least annual day trips from the neighbouring resort. Again St. Annes clearly has appeal as a destination for multiple multi-generational trips with 89% visiting just with adults but 45% also visiting with children.

### 2.2.2 Activities undertaken in St. Annes

- Perhaps unsurprisingly, the most popular activity in St. Annes for all trips is going to the beach. Beach huts and town centre events are particularly important to day visitors from home.
- When asked about reasons for not visiting the town centre, most visitors do not perceive specific barriers which prevent them from doing so. It is rather that people who go to the beach are happy to stay there and that, in most cases, they are able to find what they need

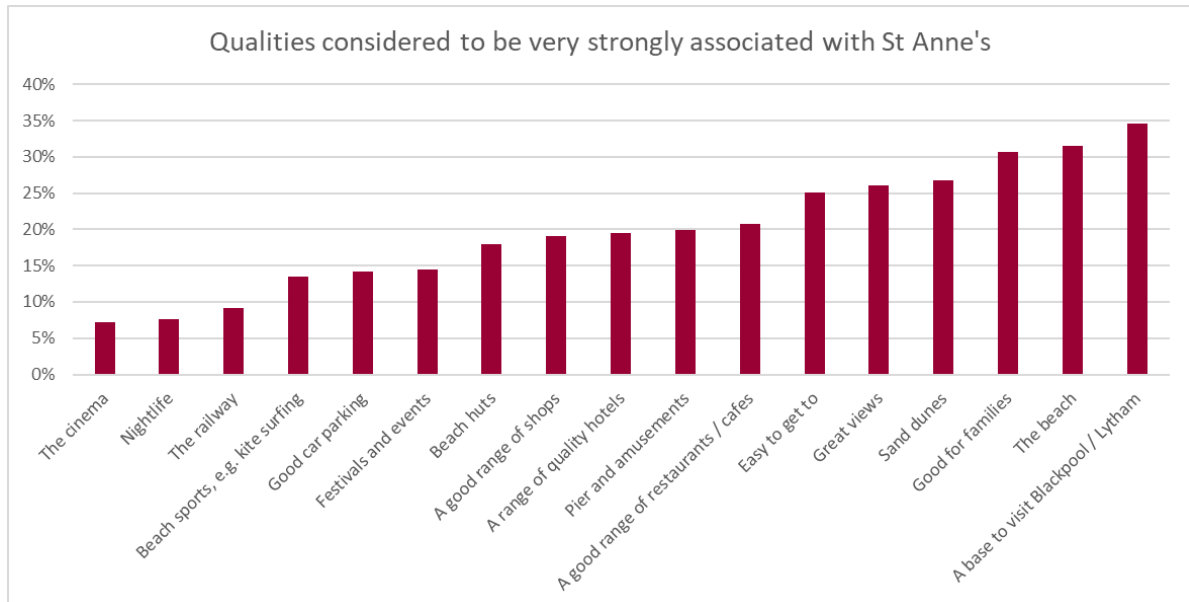
without going into the town. Parking does not appear to be a perceived issue for many visitors.

- When it comes to reasons for not visiting the beach, obviously weather is a key factor. For the majority, however, they just aren't interested in going to the beach and are busy doing other things.



### 2.2.3 Perceptions of St. Annes

- In terms of what St. Annes is most famous for, there was a clear finding – the destination is most associated with its beach and dunes but also as a place for families.
- Its proximity to Blackpool, however, is very important, particularly for people visiting from holiday (staying or day trip).
- Nearly two thirds (64%) of people had heard of St. Annes but of those who haven't visited, general lack of awareness about what is there and things of interest to do were the most common reasons given. (It is useful to note, however, that these are almost always the top reasons given for not visiting any destination).
- When testing future interest in making visits, however, the destination is clearly appealing! 30% of people would be interested in taking a short break in the destination, the second most popular potential resort from a list of ten destinations people were asked about. 24% of people would consider a day trip to St. Annes, making it the most popular of the ten resorts tested.
- Improvements to the food and drink offer, independent retail, indoor attractions, markets and branded accommodation were suggested as potential interventions that would make the resort more appealing. Events and festivals are also potential motivations for visits - but for fewer people.



## 2.3 The current visitor economy offer in St. Annes

In this section, an overview is provided of the key visitor economy assets that currently exist in St. Annes. A comprehensive assessment of the town is provided in the Health Check report that was completed as part of this study.

### 2.3.1 Natural assets

Without doubt, St. Annes beach is at the heart of its appeal as a destination – something which has been reinforced by the primary research undertaken for this report.

The UK Beach Guide describes it well as *'a huge expanse of golden sand. The sort that is perfect for running around on and building sandcastles. It's also a great spot for a paddle...'*

However, as the research highlights, it is also the sand dunes which make the area special, providing a haven for wildlife and an exciting playground for visitors.

It is perhaps the town's gardens, however, that remain the most important reminder of the resort's Victorian and Edwardian heydays. Running along the seafront, Promenade Gardens are a significant heritage asset, providing much needed seafront shelters, ornamental features, water fountains and manicured flower beds. Nearby, the Grade II listed Ashton Gardens are an important venue for festivals and events as well as offering a calm green space close to the town centre.

### 2.3.2 Visitor accommodation

For over a century, St. Annes has been a key place to stay on the Fylde coast and today accounts for 73% of Fylde Borough’s total serviced bedstock and 60% of its serviced accommodation establishments. The vast majority is in long-standing, locally based, family ownership; both quality and business performance are relatively strong.

Whilst not its only role, for many visitors (including groups as well as families/couples) the town’s accommodation offers a laid back alternative to its ‘full on’ neighbour, Blackpool – close enough to provide easy access but far enough away to offer a change of pace and relaxation.

The table below shows the details of accommodation in St Annes and how it compares to Fylde Borough as a whole.

Excepting Camping and Caravan sites, St Annes is the borough’s primary accommodation base. Today, the town has 24 serviced accommodation establishments, together providing 722 bedspaces - 73% of the Borough total. In addition, there are 14 self-catering establishments with 120 letting units, representing 70% of the establishments and 21% of the total letting units. Camping and caravanning, although a major feature of Fylde’s accommodation stock, does not feature at all in St Annes, the vast majority being located outside the two largest centres of population.

Accommodation Stock in St Annes and Fylde									
Serviced Accommodation (Rooms per Establishment)									
	Establishments	Total Rooms	<10	10to49	50to99	100to199	>200	% Total Establishments	% Total Rooms
St Annes	24	722	8	10	4	2		60%	73%
Lytham	7	97	4	3				18%	10%
Other Areas	9	168	1	8				23%	17%
<b>Total</b>	<b>40</b>	<b>987</b>	<b>13</b>	<b>21</b>	<b>4</b>	<b>2</b>		<b>100%</b>	<b>100%</b>
Self-Catering (Letting Units per Establishment)									
	Establishments	Total Letting Units	<5	5to9	10to19	20-99	100>	% Total Establishments	% Total Letting Units
St Annes	14	120	5	6	2	1		70%	21%
Lytham	4	4	4					20%	1%
Other Areas	2	450					2	10%	78%
<b>Total</b>	<b>20</b>	<b>574</b>	<b>9</b>	<b>6</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>100%</b>	<b>100%</b>
Caravan and Camping (Units & Pitches per Establishment)									
	Total Establishments	Total Units & Pitches	<10	10to49	50to99	100to199	>200	% Total Establishments	% Total Units & Pitches
St Annes									
Lytham	1	200					1	14%	20%
Other Areas	6	777		1	2	1	2	86%	80%
<b>Total</b>	<b>7</b>	<b>977</b>		<b>1</b>	<b>2</b>	<b>1</b>	<b>3</b>	<b>100%</b>	<b>100%</b>

Source: Fylde BC, AMION analysis

### 2.3.3 Attractions

Many of the town's attractions are clustered along the seafront. St. Annes pier, although currently somewhat tired, remains a striking feature on the landscape and a visual reference point from the town centre, offering cafes, amusements and children's rides.

Nearby, the Island site, whilst currently poorly designed, hosts a number of important attractions including the indoor swimming pool, cinema and the Salter's Wharf bar and restaurant.

Further along the seafront, St. Annes Beach Huts, which can be rented on a daily basis, have won various awards whilst the miniature railway, boating lake, splash pool and mini golf links provide an appealing range of family attractions.

The development of the proposed new sea wall will, without doubt, change the character of the area and its relationship to the sea but will also provide important new future opportunities.

For golfers, St. Annes offers two courses, Royal Lytham & St Annes Golf Club, one of the world's premier links courses as well as the St Annes Old Links Golf Club, a championship links course that is open to visitors.

### 2.3.4 Festivals and events

In addition to the regular Sunday concerts in Ashton Gardens, St. Annes typically hosts twelve events each year including the Kite Festival, a music and arts festival and golf tournaments. Lytham, St Annes' near neighbour, also offers a comprehensive events programme, including the Lytham Festival and the Wartime Weekend.

### 2.3.5 Food, drink and shopping

With the exception of a small number of food and drink and retail outlets around the pier, the majority of cafes, restaurants and shops are located within the town centre. Notwithstanding the challenges faced everywhere within the retail and hospitality sectors, the St. Annes town centre healthcheck notes that there is 'a healthy mix of multiple nationals and independent retailers'.

### 2.3.6 Visitor services

Despite the popularity of the resort, there are currently few dedicated visitor facilities. There is a tourist information desk in the Town Hall which is only open during office hours. Public toilets are available on the seafront next to the paddling pool, at the North Promenade car park and at the South Promenade at Fairhaven Road. In the town centre, there are public toilets in Ashton Gardens and next to the railway station. There are no showers or other beachfront facilities.

## 2.4 Policy context summary

The importance of the visitor economy in St. Annes is recognised in a number of strategic documents. The following summarises the key points from the most recent reports but a full overview is provided in the baseline report appended to this report.

- **The Fylde Local Plan to 2032** particularly notes the importance of the Island site, the importance of specialist shops, the classic heritage assets (such as Ashton Gardens) and serviced accommodation to the visitor economy.
- **Fylde Coastal Strategy (2015 – 2032)** reflects on the importance of the wide sandy beaches to support activity, relaxation and employment with particular importance for the family market. Maintaining a diverse daytime and evening economy and supporting cultural and sporting events are noted as priorities.
- **The Fylde Economic Development Strategy & Action Plan (2012-2030)** highlights the opportunity to exploit new market segments including eco-tourists and sports visitors. It references the importance of developing the public realm, heritage assets and events programme.

## 2.5 Destination management and organisation

When compared to its near neighbour, Blackpool, St. Annes is a relatively small destination with limited resources to support Destination Management functions. It has always recognised the importance of working closely with Visit Blackpool and Marketing Lancashire in order to have greater impact for its marketing and promotional activity.

The level of tourism resource within Fylde Council is, however, quite significant compared to other destinations of a comparable size, reflecting the importance of the visitor economy to the town. Within the Council team, there is a full time Tourism and Leisure Manager, supported by a Tourism and Events Officer. Two new Council posts, introduced in 2021, also support the tourism development and management functions: an Economic Development and Regeneration Manager and a Town Centres Manager.

The tourism function is governed by Fylde Council's Tourism and Leisure Committee which is responsible for sports, arts, leisure and cultural provisions, parks and open spaces, sand dune and beach management, and tourism and events promotion policies.

Although in the past there was a forum specifically for visitor economy businesses in St. Annes, this no longer meets as a dedicated group. STEP, the St. Annes Enterprises Partnership, however, has seven 'theme teams' which include Events, Food & Drink and Hotels & Accommodation as well as more general themes of regeneration and maintenance and management.

*Beach Huts and Promenade, Island site showing current inappropriate sea-facing development*



## 2.6 Gaps in the St. Annes offer

Drawing on the analysis from the baseline report and primary research, this section considers the gaps in the current offer. Addressing these gaps will form the basis of the future priorities action plan.

A clear picture is emerging about where St. Annes' strengths lie and the types of visitors who are drawn to the destination, both now and in the future. The gaps that need to be filled are those that build on these existing strengths and meet the needs of the visitor markets who represent realistic prospects.

### 2.6.1 *The beach and dunes as a 'one stop' destination*

The beach, dunes and seafront at St. Annes are clearly already seen by visitors as a compelling destination. When people come to the seafront, they want to be able to 'make a day of it'. At the moment, however, there are a number of weaknesses and gaps in the current offer.

**The pier** is a key landmark and a focal point for the town but, despite its importance to the destination, the buildings and structures are tired and dated. The area around is dominated by car parking whilst pedestrian routes and other forms of visitor access are of secondary importance. Improving the pier, the public realm around it and access for visitors on foot, by bike or by other means of transport will allow this key heritage asset to play a more significant role in the future.

**The Island** is another key site that occupies a prime position on the seafront and although it has an important role to play as a year round and wet weather site, at present, it does more to detract from, rather than enhance, the destination. The pool provides an opportunity to swim throughout the year which links well to the seafront theme but the current pool building could be a municipal leisure centre anywhere. Similarly, the Island cinema is a relatively low quality ‘black box development’ that adds nothing to the seafront location. The Island site needs to be reimagined with a new offer which continues to provide complementary indoor facilities but which use the seaside location better.

Although the research suggests that visitors currently use the beach as a self-contained destination, there are very few **beach front facilities and services** which meet their needs and help them to extend their visit. Facilities such as beach-shack style cafes, beach bars, small event and animation spaces, and beach side showers would all allow St. Annes to capitalise on its most important natural asset.

### 2.6.2 *St. Annes for families*

The South Promenade area as a whole is a key draw for family visitors and is home to most of the existing family attractions. There are, however, a number of ways in which the destination could be developed to become a ‘best in class’ family destination. These include the gaps identified above around the beach and prime beach front sites but also:

- playful public realm and public art installations which punctuate the destination with opportunities for play and fun;
- playful (but safety enhancing) lighting schemes, wayfinding and signage
- good cycling access and infrastructure with specific emphasis on safe family cycling;
- a compelling family events and activities programme; and
- a good range of family friendly visitor accommodation including serviced accommodation with family rooms at a range of price points and self-catering accommodation for extended and multi-generational families

### 2.6.3 *Visitor accommodation*

St. Annes is currently well provided for with independent hotels and hotels which meet the needs of couples, families, groups and coach parties.

There are, however, currently some gaps in the existing offer. Firstly, there is only one branded hotel in the resort, Travelodge. Branded serviced accommodation is typically popular with family visitors as well as the active 55+ market staying outside of the main season. Whilst the independent hotels meet the needs of some visitors very well, branded hotels can attract new visitors and have a wider marketing reach than most independents can afford.

Whilst there are a number of hotels in the resort at present which offer leisure and wellness facilities, there is also little full service spa provision. This type of offer is important if St. Annes is to realise its full potential as a serene alternative to neighbouring Blackpool.



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Other gaps include larger self-catering properties for multi-generational families as well as appropriate facilities for camper vans which encourage longer stays with higher levels of spend within the destination. The current Island site pitches, whilst popular, are inappropriate and represent a poor use of this key seafront area.

#### *2.6.4 Destination management and marketing*

Fylde Borough Council will always play a key role in the management of the destination and the new roles that were created in 2021 will provide important additional resource to support the future growth of the visitor economy.

In terms of marketing St. Annes, the partnership approach, working closely with Visit Blackpool and Marketing Lancashire will be essential in growing visitor numbers, supplemented by highly targeted online and social media marketing activity.

At present, however, there are limited opportunities for private sector partners – providers of most of the visitor offer – to work in partnership with Fylde Council and its neighbouring destination partners. Developing a workable forum by which the private sector can play a more significant role in the future development of the destination will be essential in ensuring its success.

## 3 Future Plan

### 3.1 Defining St Annes USP and future vision

St. Annes is very fortunate. It has many natural assets and compelling features which have allowed it to thrive as a destination for over 150 years. The research, however, has highlighted that it has one overarching unique selling point - its wide, open golden beaches and its striking sand dunes. This timeless natural asset will remain at the heart of what makes St. Annes special.

Alongside this, St. Annes has two important opportunities which will continue to form part of its successful future. Firstly, it has long been enjoyed as ‘Blackpool’s retreat’ – a calm sanctuary that is close enough but also just away from the ‘full on fun’ of its near neighbour. As Blackpool’s ambitious regeneration plans continue to take shape, St. Annes will develop its offer to support and take advantage of this opportunity. Alongside this is a need to continue to complement nearby Lytham with its strong food offer and evening economy. The three resorts work well together and care needs to be taken not to upset the balance.

Secondly, its seafront, beaches and manageable scale make it an ideal destination for family visitors to the North West coast. The masterplan and this DMP will help to realise the town’s ambition to become a ‘best in class’ family resort destination.

### 3.2 Priorities

The priorities and actions which follow will all ensure that St. Annes builds on its unique opportunities and strengths.

#### 3.2.1 *Develop the extended family offer*

St Annes is first and foremost a family destination, especially as a complementary resort to its neighbours Lytham and Blackpool. The primary research has indicated St. Annes’ core appeal in this area. The trend of multi-generational family visits is one that St. Annes is well placed to exploit. Actions include:

- develop a **24 hour beach experience**, especially in the evening to increase dwell time and visitor spend through introduction of appropriate non-commercial and commercial facilities, events and animation;
- introduce a more integrated direct management approach for family focussed **entertainment and animation** on or near the beach building on the current cross service approach;
- ensure the **redevelopment of the Island site and Promenade Gardens** reinforces and introduces facilities/businesses attractive to families, especially wet weather attractions;
- engage with the operator of the **pier** to enhance the quality of the offer, potentially maximising the ‘seaside heritage’ elements of the current set up;

- work with current Island operators, for example, beach hut operator and the railway, to develop an **integrated offer and marketing activity** for the area;
- encourage the introduction of **branded family hotels**, increasing the appeal of the town to new markets;
- support the development of **'family friendly' restaurants** in the town centre and encourage existing business to adopt family friendly practices and facilities, for example, play options, highchairs, menus;
- introduce a range of appropriate **catering concessions** on or near the beach (beach shack styles cafes, beach side bars etc.);
- ensure that both existing and new **events** add to the appeal to families and contribute to increasing visits (day and staying) from this market;
- develop and implement a **consistent marketing approach** with local partners, emphasising the family appeal of the resort; and
- consider a self-policing 'family friendly St Annes' **brand marque for businesses**, similar to 'Good to GO' post-covid scheme.

### 3.2.2 *Maximise St Annes' role as Blackpool's Retreat*

St. Annes is a resort in its own right, but it also provides a complementary role to its giant neighbour – importance which was highlighted both by the primary research and also the accommodation businesses who were consulted as part of this study<sup>3</sup>. The three Fylde coast resorts are complementary, with St. Annes providing high quality accommodation, the beach and a calmer, more family friendly, relaxed and genteel atmosphere. Lytham offers a more adult-focussed experience with a strong evening economy, which is complementary to both St. Annes and Blackpool. The opportunity exists within this priority for St. Annes to develop as a centre for spa and wellness facilities, building on existing provision. This interdependence can be maximised for St. Annes through the following actions:

- encourage the development of **spa and wellness** businesses and facilities, both in hotels and non-residential sites, to emphasise the 'retreat' role of St Annes;
- ensure that the **redevelopment of the town centre** provides opportunities for rest and relaxation through public realm interventions;
- promote the role of **Ashton Gardens** as a place for informal recreation;
- develop **walking and cycling infrastructure** to slow down the pace of experience;
- review and, where possible, reinforce **direct transport links** with Blackpool, enhancing visitor flows between the two resorts;

<sup>3</sup> Accommodation operators consulted as part of this DMP indicated that up to 40% of total business is generated by Blackpool, either as overspill or preference for a high quality and quieter base to stay.

- ensure the redevelopment of the **Island site & Promenade Gardens** provides facilities consistent with the theme e.g. space to experience the coastline in a quiet and reflective manner;
- develop complementary **programming** and ensure St. Annes businesses are aware of Blackpool events to maximise revenues;
- consider **themed activity** (for example, Wellness Weekends) bringing together existing operators to reinforce the positioning of St Annes for relaxation etc.; and
- develop dedicated **web and social media content** related to this theme in destination promotion.

### 3.2.3 *Strengthen the 'Classic Resort' destination experience*

Although the 'Classic Resort' concept did not gain the traction originally intended<sup>4</sup>, many of its principles (quality, heritage, high standards of environmental management) remain sound and can be applied to St. Annes. Developed as a resort, with a proud history and strong current performance, including recovery from Covid, St. Annes is in many ways already a classic resort. As with most destinations, however, it needs to improve its quality in a few key areas. These could include:

- seek funding for and delivering **high quality improvements** to the town as identified in the Master Plan in key visitor areas such as the Town Centre, key gateways and the Island/promenade area;
- ensure consistent **high standards of environmental design, management and maintenance** throughout the town but especially at key gateways, primary pedestrian areas and the promenade/beach;
- ensure that capital redevelopment of the Island site and promenade gardens **reflect the town's heritage whilst providing modern, contemporary facilities** of the highest possible level of quality in design, materials and operations;
- similarly ensure Town Centre public realm improvements are **designed around the needs of visitors** as much as residents and businesses;
- develop and implement a comprehensive **wayfinding** (and potentially interpretation) system that make it easy to navigate St. Annes;
- consider, secure funding for, and deliver **front of house staff training** in areas such as customer service, local product knowledge etc. to complement functional skills; and
- liaise with the **pier operator**, encouraging improved quality and investment in this key piece of resort infrastructure.

<sup>4</sup> Around 20 years ago, the Regional Development Agency for the North West supported the concept of the Classic Resort becoming a brand marque for quality seaside destinations, in the same way that the Blue Flag scheme does for beaches.

### 3.2.4 Strengthen VE management and experience

As already noted, St Annes is a small resort that functions well within the overall Fylde Coast, offering complementary experiences and facilities, with the beach its USP. Built as a resort, it has some very successful, long-established, locally owned and managed businesses which are 'invested' in the town. At present, however, apart from the STEP organisation, there is a lack of collective dialogue with the council. Most visitor economy businesses either have individual relationships with the Council, or largely pursue their own route. If future opportunities are to be maximised, it will be crucial that relationships are formalised and strengthened between the Council and visitor economy businesses, ensuring that the destination functions effectively both at local and wider levels. Actions in this area could include:

- continue to work with Visit Blackpool and Marketing Lancashire to deliver **marketing and partnership opportunities**;
- investigate the appetite for a more formal **Visitor Economy partnership** with the private sector at either Fylde or St. Annes level; and
- develop, in partnership, **a new brand marque and marketing identity for St. Annes** based on the findings of this Destination Management Plan, with a focus on the destination's USP and its identified target markets (see below).

*High Street and Promenade showing RNLI Station and 'The View' Restaurant*



### 3.3 Target markets

Fylde Borough Council, in delivering this Destination Management Plan, will adopt the ‘Project Lion’ segmentation approach developed by Visit England in 2016. This breaks down UK holiday takers into five core segments, of which two are the most relevant to St Annes. Segmentation allows destinations to tailor their key messages, marketing activities and programming to those most likely to visit. This does not mean, of course, that other segments do not, or will not, visit St. Annes. It does, however, allow resources to be targeted carefully for maximum impact.

#### 3.3.1 *Fun in the Sun Segment*

Typically parents looking for family orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more ‘social’ alternatives to hotel accommodation, such as caravans or holiday parks.

Market Size: 20%

Number of People in segment within 90 minutes of St Annes = 1.4 million

#### 3.3.2 *Fuss Free Value Seekers Segment*

Empty nesters on a budget, they seek good value beach holidays with convenient transport links. Tend to be less digitally active than other segments – less likely to engage in social media or book a holiday online.

Market Size: 11%

Number of People in segment within 90 minutes of St Annes =780,000

### 3.4 Outcomes and targets – overarching

In monitoring the progress of this DMP, we will adopt a small number of key indicators.

#### 3.4.1 *Accommodation occupancy*

Fylde BC does not currently monitor occupancy levels in our accommodation sector. We will work with key businesses to develop an anonymised and representative occupancy indicator utilising such existing sources as STR Global.

#### 3.4.2 *STEAM – return to 2019 by 2025*

Fylde commissions an annual estimate of volume and value. Prior to Covid-19, growth as measured by the volume of visitors was relatively static around 2.3 million, although visitor spend had increased year on year, from £223 million in 2014 to £272 million in 2019. The graphs at Section 2.1.4 show the overall figures for the period 2014-20. We will target a return to 2019 levels (2.82 million day visitors and 513,000 overnight visitors) by 2025.

### 3.4.3 *Increase visitor spend per head (STEAM)*

Although overall volumes were massively impacted by Covid-19, visitors (as measured by STEAM) spent more per head in 2020 than in previous years as demonstrated by the table at Section 2.1.4. We will work to increase these indicators by 2025 to:

	2020	2025
Day Visitors	£38	£45
Overnight Visitors	£357	£370
All Visitors	£94	£100

## 4 Action Plan

The following Delivery Plan sets out the key actions listed in Section 2.3, identifying the priority to which each action contributes, any dependencies/relationship with the masterplan, the lead organisation (or department in the case of Fylde BC) plus partners with an indicative timescale across the three year life of this Destination Management Plan (and beyond where appropriate). The DMP begins upon formal endorsement by the council, expected later in 2022 with 12 months periods set out from that start date.

Key Priorities are identified with an abbreviation in the table as follows:

- EFO = Develop the Extended Family Offer
- FC = Maximise Fylde Coast Complementarity and role as Blackpool's Retreat
- CR = Strengthen 'Classic Resort' Destination Experience
- VEM = Strengthen VE Management & Experience

A number of projects should be continuous once begun, especially those in the marketing and events/animation areas. The symbol ● is used to denote **the start year** and, where appropriate, the development and initial implementation phase runs into a second year..

Capital projects are based on the masterplan programme, itself impacted by the sea defence works. Generally speaking, the larger interventions on the Island Site/Promenade should wait until completion of the coastal defences. However, those works are being delivered in stages to allow the 2023 and 2024 Summer periods to take place with minimal disruption so others, for example, the 'directly managed' approach for events, could happen earlier.

Revenue projects that require little or no additional funding are largely anticipated to start in Y1 with those that require additional funding or have longer lead in times (for example, events) not starting till Y2 or later. Those revenue projects that should wait till the completion of the coastal defence works (and hopefully other seafront developments) are indicated as starting later i.e. Y3 and later. Fylde BC core tourism staff is currently 1 FTE plus 0.25 management time.



Action Plan								
Action	Priority	Masterplan Project	Lead	Partners	Y1	Y2	Y3	Y4+
St Annes Brand Marque	FC,VEM	N/A	FBC (L&C)	Businesses, Town Council, STEP, STAIR				•
Family Friendly St Annes Brand	EFO,FC		FBC (L&C)	Businesses	•	•		
Family Based Marketing with partners	EFO		FBC (L&C)	Businesses, STEP	•	•		
Integrated Seafront Marketing	EFO,VEM		FBC (L&C)	Seafront Businesses (Beach Huts, Railway, Cinema etc.)			•	•
Promote Town Centre and Ashton Gardens as places for relaxation	FC,CR		FBC (L&C)	Town Council	•			
'Retreat' Web & Social Media content	FC		FBC (L&C)	Businesses, STEP & STAIR		•		
Joint working with Marketing Lancashire & Blackpool	FC,VEM		FBC (L&C)	ML & BBC	•			
Direct Management Approach & 24 hour Beach Experience	EFO,CR	N/A	FBC (L&C)	Island site/promenade businesses, RNLI			•	•
Encourage more Family Friendly	EFO,CR		FBC (L&C)	Town Council, Event organisers	•	•		

Action Plan								
Action	Priority	Masterplan Project	Lead	Partners	Y1	Y2	Y3	Y4+
events and review content of existing events								
Complementary Event programming with neighbours	EFO,FC		FBC (L&C)	BBC, event organisers			•	•
Consider Themed Activity e.g. Wellness Weekends	FC		FBC (L&C)	Businesses		•		
Develop Family Friendly non-commercial and commercial facilities	EFO	•	FBC (Planning)	Businesses and operators			•	•
Island Site and Promenade Gardens development to meet needs of families	EFO	•	FBC (Planning)	Developers/businesses			•	•
Encourage family focused restaurants and branded accommodation	EFO	•	Developers/businesses	FBC (Planning)	•			

Action Plan								
Action	Priority	Masterplan Project	Lead	Partners	Y1	Y2	Y3	Y4+
Encourage New Spa & Wellness Facilities	FC	•	FBC (Planning)	Developers, businesses	•			
Town Centre scheme to provide for rest and relaxation	FC	•	FBC (Planning)	Town Council?		•	•	
Walking & Cycling routes	FC	•	FBC (Planning)	LCC, Town Council			•	•
Seek funding for projects with high quality improvements to Town Centre, Gateways and Island/Promenade	CR	•	FBC (Planning)	LCC, developers, businesses, Northern Rail	•			
Wayfinding and interpretation system (M)	CR	•	FBC (Planning)	LCC, STEP & STAIR			•	
High quality management & maintenance of public realm and Island site	CR	•	FBC (Planning)	LCC, businesses				•
Investigate more formal St Annes VE partnership with private sector	VEM	N/A	FBC (L&C)	Businesses, STEP & STAIR, Town Council		•		

Action Plan								
Action	Priority	Masterplan Project	Lead	Partners	Y1	Y2	Y3	Y4+
Improve quality of pier with existing operator	EFO,CR	•	FBC (Planning)	Pier owner			•	
Product Knowledge and Training	CR	N/A	FBC (L&C)	Businesses, STEP & STAIR		•		

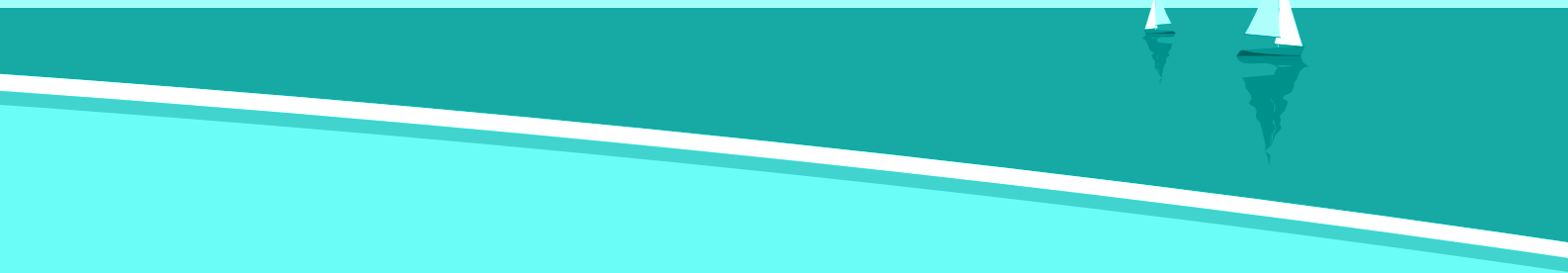
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## Appendix A – Supplementary reports

The following reports sit alongside the Destination Management Plan and form part of the rationale for the recommendations:

This report, therefore, sits alongside the following documents:

- St. Annes visitor economy baseline assessment;
- St. Annes socioeconomic baseline assessment;
- St. Annes visitor economy primary research summary report; and
- St Annes Regeneration Town Centre Strategy and Masterplan Report (due for completion May 2022).



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