

ST ANNE'S TOWN CENTRE STRATEGY & MASTERPLAN

Stage 1: Visitor Economy Baseline Report

02 February 2022




BDP.

Fylde Council

St Annes Town Centre Strategy & Masterplan

Visitor economy

January 2022

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Executive summary

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

The Covid-19 Pandemic

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 volume and value indicators.

Coastal Tourism remains significant, with tourism providing c.15-20% of direct employment in coastal communities. Whilst seasonality is reducing, July and August accounted for 32% of all visits to the coast in 2018. Long term trends include a reduction in the groups, coach market and business events being held on the coast. Opportunities include off-peak active markets in the 55+ age range.

Regionally

Regionally (in the North West), growth was flatter, with a 1.4% growth in trips and 3.3% in spend between 2010 and 2019.

According to STEAM 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.

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 in 2019 was £272m (up 3.2% from 2017), supporting 3,314 FTE jobs.

Compared to 2019, Fylde saw a 65.2% decline in day visitors in 2020, recording just 980,000 day visitors. The number of staying visits only reached 210,000, down by 59% compared to 2019, with the majority of visits occurring during the first quarter.

Visitor surveys from 2010 and 1995 show a visitor profile of an older age group (65+), loyal to the area, half of whom are visiting Fylde for the day from Blackpool.

Fylde residents are relatively affluent and more likely to be highly educated, skilled and older than the national average. Just under 50% of the population come from MOSAIC segments 'Senior Security', 'Prestige Positions', 'Suburban Stability' and 'Domestic Success', which represent 29% nationally.

Identified market segments for Lancashire, using Visit Britain's segmentation model, are 'Independent Explorers', 'Connoisseur Searchers' and Entertainment Seekers'.

St Anne's accommodation business profile is dominated by long-established, family-owned independent hotels who appear to have weathered the Covid storm relatively well. Leisure business has recovered extremely well from the pandemic although the midweek corporate

market has collapsed. There is however a high level of confidence in the future and investment is either underway or planned for a number of businesses.

St Anne's and the rest of the Fylde coast are complementary not competitive, with St Anne's providing high quality accommodation, a better environment for families and an 'all day' beach which is not subject to tides.

The day and staying visitor markets are complementary; key generating areas are East Lancashire, Greater Manchester, Merseyside and Scotland.

The small number of businesses consulted considered there was a need for a radical rethink for the Island site in the future.

St Anne's positioning has been focussed on its traditional role as a higher quality family resort and the 'Classic Resort' concept.

The SWOT analysis identifies many strengths but sees poor connectivity and linkages between the town and the beach/Island as a key weakness

Future opportunities could include: Beach and wind-based sports, spa and wellness tourism, a continued but improved 'family' resort approach and/or a focus on the concentration of vintage and antique shops in St Anne's.

1 Background

1.1 Background to this report

AMION Consulting has been appointed, as part of the BDP team, to produce a masterplan for St. Anne's.

AMION has two roles within the team: to provide Business Cases for the masterplan as a whole and for the Island site specifically (which is being developed by the Economics Team); and to provide visitor economy inputs into the work including a Destination Management Plan (provided by the Visitor & Leisure Team).

This report forms part of the Stage 1 outputs and provides a baseline assessment of the visitor economy. It sits alongside the Socio-economic Context Report which has been developed by AMION's economists.

Specifically, this report looks at the historic volume and value of St. Anne's visitor economy and explores some potential development themes that could form part of the masterplan options in Stage 2 of the masterplan study.

It also forms the baseline analysis for the Destination Management Plan which will be developed with stakeholders in Stage 3 of the work. This final stage of the work will include the findings from primary research that is being undertaken into visitor perceptions and behaviours.

2 Baseline visitor economy assessment

2.1 National tourism trends

Although there have been peaks and troughs over the last ten years, the long-term trend from 2010 to 2019 for UK domestic tourism has been stable with modest increases in tourism trips (average of 0.7% pa) and nights (average of 0.3% pa) but more pronounced growth in tourism expenditure (average 2.7% pa). 2019, as the last full year before the global pandemic, is generally used as the reference year for comparison going forward, rather than the ‘exceptional’ years of 2020 and 2021.

Overall, the number of domestic trips increased by 6.1% between 2010 and 2019, the number of nights by 2.9% and tourism spend by 24.5%.

GB - ALL TOURISM						
	Trips	%Δ y-o-y	Nights	%Δ y-o-y	Spend	%Δ y-o-y
2010	115.7m		361.4m		£19,797m	
2011	126.6m	9.4%	387.3m	7.2%	£22,666m	14.5%
2012	126.0m	-0.5%	388.2m	0.2%	£23,976m	5.8%
2013	122.9m	-2.5%	373.6m	-3.8%	£23,294m	-2.8%
2014	114.2m	-7.0%	349.5m	-6.4%	£22,692m	-2.6%
2015	124.4m	8.9%	377.1m	7.9%	£24,825m	9.4%
2016	119.5m	-4.0%	359.6m	-4.6%	£23,079m	-7.0%
2017	120.7m	1.0%	369.5m	2.8%	£23,683m	2.6%
2018	118.6m	-1.7%	371.7m	0.6%	£23,961m	1.2%
2019	122.8m	3.5%	371.8m	0.0%	£24,651m	2.9%
10y av	121.1m	0.7%	371.0m	0.3%	£23,262m	2.7%

Source: Visit Britain, GB Tourist Annual Report, 2010-2019

There is much talk of the staycation impact of the Covid pandemic but 2019 was already a strong year for domestic tourism:

- 122.8m trips: 1.4% above the 10-year average of 121.1m trips;
- 371.8m bednights: 0.2% above the 10-year average of 371m nights;
- £24.6bn tourism spend: 6% above the 10-year average of £23.3bn;
- average length of stay was 3.0 nights (vs 3.1 nights 10-year average);
- average spend per trip was £200 (vs £192 10-year average); and
- average spend per night was £66 (vs £63 10-year average).

Domestic holiday tourism is the most important type of tourism to St Anne’s and the wider Fylde area. At a national level, 2019 was a strong year for holidays tourism:

- there were a record level 60.5 million holiday trips: accounting for 49% all domestic tourism trips in 2019 and trending 6.1% above the 10-year average;

- the number of holiday bed nights in 2019 was 198.1m: 53% of all tourism night but just 0.1% above the 10-year average;
- domestic holiday spend amounted to £14.5 bn: 59% of all tourism spend in 2019 and 7.2% above the 10-year average; and
- the average length of stay for domestic holiday tourism trips was 3.0 nights

GB - HOLIDAY TOURISM						
	Trips	%Δ y-o-y	Nights	%Δ y-o-y	Spend	%Δ y-o-y
2010	54.7m		197.2m		£11,534m	
2011	58.4m	6.7%	208.5m	5.7%	£13,000m	12.7%
2012	57.7m	-1.3%	203.1m	-2.6%	£13,763m	5.9%
2013	57.0m	-1.3%	198.2m	-2.4%	£13,472m	-2.1%
2014	52.9m	-7.1%	184.8m	-6.8%	£13,065m	-3.0%
2015	56.0m	5.8%	194.6m	5.3%	£14,171m	8.5%
2016	55.9m	-0.1%	190.9m	-1.9%	£13,313m	-6.1%
2017	59.1m	5.8%	202.3m	6.0%	£14,134m	6.2%
2018	57.9m	-2.1%	200.3m	-1.0%	£14,300m	1.2%
2019	60.5m	4.5%	198.1m	-1.1%	£14,500m	1.4%
10y av	57.0m	1.2%	197.8m	0.05%	£13,525m	2.9%

Source: Visit Britain, GB Tourist Annual Report, 2010-2019

Albeit of lesser importance to tourism in St Anne’s and the wider Fylde area, it is worth noting that inbound tourism was also performing strongly in 2019 (prior to the Covid pandemic) with 40.9m visits (up 1% compared to 2018 but below the 41.08m record from 2017) and generating a new all-time record of £28.4m in tourism expenditure (up 7% compared to 2018).

2.2 Covid impact

The UK’s tourism industry has been particularly hard hit by the corona virus pandemic. Over the two-year period of 2020-2021, the country saw an estimated loss of £48.6bn in inbound tourism spend and £97.1bn in domestic tourism spend.

2.2.1 Inbound tourism

ONS estimates show that, in 2020, the UK received 11.1 million inbound visits, a 73% decline from the visit levels seen in 2019. The majority (63%) of these visits were in Q1 (Jan-March). Expenditure was also down in 2020, with inbound visitors to the UK spending a total of £6.2 billion, a decline of 78% on 2019 results.

Visit Britain’s latest forecast¹ for 2021 is for 7.7 million international arrivals to the UK, which is a further 31% decline on arrivals in 2020 and only 19% of the 2019 level. Three quarter (5.8 million)

¹ At the time of writing this report, Visit Britain’s inbound forecast was last updated November 17th, additional commentary was added to the website by Visit Britain on November 29th; Domestic forecast was last updated December 16th.

of the total number of inbound visitors in 2021 is forecasted to come from Europe and 1.9 million from long haul markets.

Visit Britain’s expenditure forecast is equally suppressed with just £6.9 billion anticipated to be spent by inbound tourists in 2021, a decline of 11% on 2020 and representing just 24% of the 2019 level.

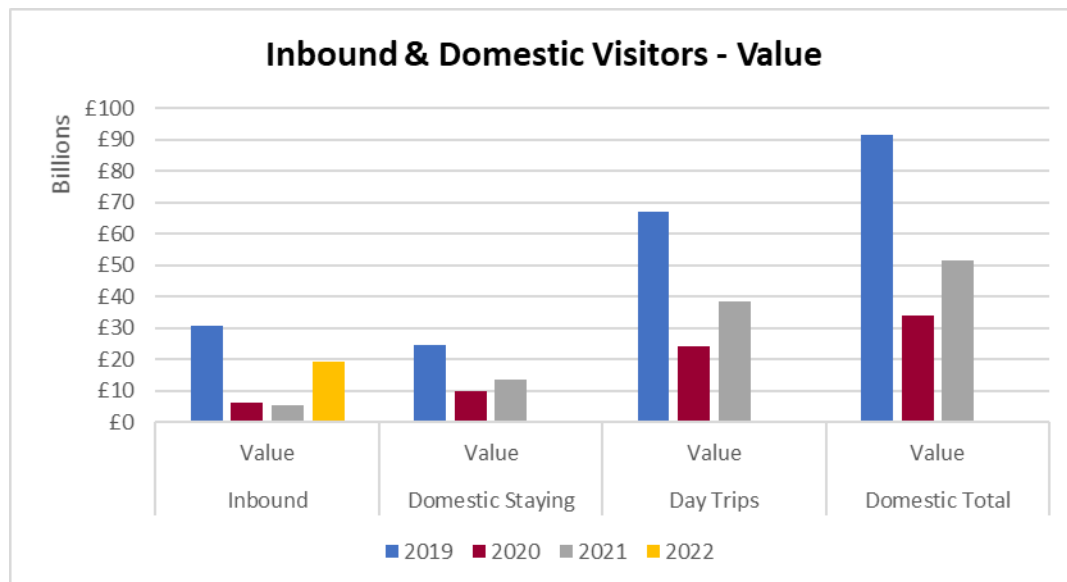
For 2022, Visit Britain forecasts the number of international tourism arrivals to the UK to increase to 24.0 million and spending to increase to £19.2 billion. These figures are 59% and 67% respectively of the visits and spend levels seen in 2019.

Although the general direction is assumed to be upwards – contingent on travel restrictions not being tightened significantly as well as a gradual return of traveller confidence – Visit Britain anticipates that it will take a few years still for inbound visitor numbers to return to 2019 levels. Spend per visit is expected to remain higher than the pre-pandemic norm, due to longer average length of stay as well as higher prices.

2.2.2 Domestic tourism

Visit Britain’s surveys of domestic overnight tourism and day visits were suspended in 2020. However, Visit Britain estimates that 2020 saw a decline of 60% in domestic (overnight) tourism trips and 64% decline in leisure day trips, resulting in a 63% fall (or £57.6bn loss) in total domestic tourism spending compared to 2019.

For domestic tourism, Visit Britain’s (VB) ‘central scenario’ is for a recovery to £56.2bn in tourism spending in Britain in 2021. This is up 65% compared to 2020 but still only 61% of the level of spending seen in 2019. The VB forecast for 2021 can be split into £16bn in domestic overnight tourism spending (which represents 64% growth on 2020 but still only 65% of the 2019 level) and £41bn in day trip spending (equivalent to 65% growth on 2020 and 61% of the 2019 level). Again, this involves many assumptions and simplifications due to the uncertain situation and is subject to revision.



2.3 Regional tourism trends

2.3.1 North West

At the regional level, domestic tourism numbers over the last 10 years have equally seen ups and downs but also remained relatively flat overall with just 1.4% overall growth in trips, 1.1% growth in nights and 3.3% growth in tourism expenditure in the North West of England.

The following trends could be observed for domestic tourism in the North West in 2019, which generally was a strong year for the region – see table below for more detail:

- 14.1m domestic tourism trips: 5.9% up on 2018 and 5.0% above the 10-year average;
- 37.9m bed nights: 11.1% up on 2018 and 5.5% above the 10-year average;
- £2,940m in domestic tourism expenditure: 9.8% up on 2018 and 14.6% above the 10-year average;
- average length of stay was 2.7 nights: similar to 10-year average;
- average spend per trip was £209 vs £192 10-year average;
- average spend per night was £77 vs £71 10-year average; and
- in terms of bed nights spent in each region, the North West tends to see a larger proportion of nights spent by those living in the same region (24.5%) than the country average.

NORTH WEST - ALL TOURISM						
	Trips	%Δ y-o-y	Nights	%Δ y-o-y	Spend	%Δ y-o-y
2010	12.5m		34.5m		£2,260m	
2011	14.0m	11.7%	37.1m	7.5%	£2,549m	12.8%
2012	14.2m	1.4%	38.0m	2.4%	£2,664m	4.5%
2013	14.0m	-1.5%	35.8m	-5.7%	£2,458m	-7.7%
2014	12.7m	-8.9%	36.0m	0.6%	£2,465m	0.3%
2015	13.6m	6.4%	36.8m	2.2%	£2,555m	3.7%
2016	12.0m	-11.5%	31.2m	-15.3%	£2,364m	-7.5%
2017	13.7m	13.9%	37.8m	21.2%	£2,733m	15.6%
2018	13.3m	-2.8%	34.1m	-9.8%	£2,677m	-2.0%
2019	14.1m	5.9%	37.9m	11.1%	£2,940m	9.8%
10y av	13.4m	1.4%	35.9m	1.1%	£2,567m	3.3%

Source: Visit Britain, GB Tourist Annual Report, 2010-2019

Domestic holiday tourism in the North West saw a revival in 2019 compared to 2018 but, overall, volume and value of domestic tourism remained below the 10-year average and below the records set at the beginning of the decade.

The following key statistics can be observed for domestic holiday tourism in the North West in 2019:

- 7.7 m domestic holiday trips: 4% up on 2018 but 5% below the 10-year average;
- domestic holiday tourism trips accounted for 52% of all tourism trips in the region compared to 57% historically (based on the 10-year average) which is also a higher proportion than the national average (43%);
- holiday bed nights in 2019 (20.5 million) were up 7.4% compared to 2018 but trailed 7% below the 10-year average;
- Expenditure on domestic holiday trips in the North West reached £1.8bn in 2019: up 5.4% on 2018 and 7.7% above the 10-year average;
- average length of stay was 2.8 nights vs 2.9 night 10-year average;
- average spend per trip was £247 vs £218 10-year average; and
- average spend per night was £88 vs £76 10-year average.

NORTH WEST - HOLIDAY TOURISM						
	Trips	%Δ y-o-y	Nights	%Δ y-o-y	Spend	%Δ y-o-y
2010	8.9m		26.5m		£1,693m	
2011	9.7m	8.5%	28.3m	6.8%	£1,872m	10.6%
2012	9.8m	1.6%	28.2m	-0.4%	£1,920m	2.6%
2013	7.1m	-27.1%	19.7m	-30.3%	£1,471m	-23.4%
2014	6.8m	-4.7%	19.8m	0.7%	£1,582m	7.5%
2015	6.7m	-2.2%	19.4m	-2.1%	£1,496m	-5.4%
2016	6.3m	-5.0%	17.8m	-8.3%	£1,473m	-1.5%
2017	7.4m	17.3%	20.9m	17.8%	£1,758m	19.3%
2018	7.0m	-5.2%	19.1m	-9.0%	£1,716m	-2.4%
2019	7.3m	4.0%	20.5m	7.4%	£1,809m	5.4%
10y av	7.7m	-2.0%	22.0m	-2.5%	£1,679m	0.8%

Source: Visit Britain, GB Tourist Annual Report, 2010-2019

Although less important in number compared to domestic tourism, in 2019, the North West saw a 6% and a 4% increase in inbound visits and spending respectively compared to 2018. Visits set a new record for the region (3.4m), while spend (£1.6bn) remained the second highest spending to date (behind the 2017 record). The average length of stay for international visitors to the North West was six nights, average spend trip was £470 and average spend per night was £80.

The top five international markets for the North West between 2017 and 2019 were the Irish Republic, USA, Germany, Spain and Poland. Blackpool is the 5th most popular town for inbound visits to the North West, after Manchester, Liverpool, Chester and Preston.

2.3.2 Lancashire

Tourism is important for Lancashire. As highlighted in the 2015-2020 Lancashire Visitor Economy Strategy, the sector employs 1 in 10 of the working population and represents 7% of the county’s GVA.

According to STEAM data², between 2012 and 2018, Lancashire’s visitor economy sector saw six years of consecutive growth.

In 2018, Lancashire welcomed 8.22 million staying visits (12%) and 60.5 million day visits (88% of total), resulting in a total of 68.7m visits (a 10.2% increase or 6.4 million additional visits compared to 2012) and generating a £2.23bn contribution to the Lancashire economy.

However, in 2020, national lockdowns as well as strict local higher tiers lockdowns severely disrupted business resulting in a 47.4m drop in total tourism visits and £2.6bn reduction in tourism spend (compared to 2018). The number of day visits saw a reduction of 70% whilst the number of staying visits reduced by 62%.

Albeit disturbed by the recent Covid lockdowns, three of Lancashire’s 2020 ambitions that remain particular relevant for St Anne’s include:

- “to be recognised as one of the top five 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”; and
- “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”.

Lancashire’s customer segmentation is indicated to fall into three broad segments:

- **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.

² 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.

The extent to which these segments are important to St. Anne’s will be assessed through the findings from the primary research which is being undertaken as part of the second stage of this study.

2.3.3 Fylde

The volume of day visits and staying visits has remained relatively constant in the six years prior to the Covid pandemic but the economic impact of tourism has steadily risen (see the table below).

	2014	2015	2016	2017	2018	2019
Total visitors	3.1m	3.1m	3.3m	3.32m	3.27m	3.33m
day visitors	2.58m	2.6m	2.8m	2.81m	2.75m	2.82m
overnight visitors	509,000	487,000	502,000	501,000	517,000	513,000
Total economic impact	£223m	£229m	£242m	£249m	£263m	£272m
day visitors	£85m	£88m	£95m	£97m	£99m	£104m
overnight visitors	£138m	£141m	£147m	£151m	£164m	£168m

At the Fylde level, STEAM data shows a similar impact of the Covid pandemic.

In 2019, a total of 513k visitors stayed overnight in Fylde as part of a short break or holiday, generating over 1.94m accommodation nights and £168m in tourism spend. The average length of stay for overnight visitors in Fylde in 2019 was 3.8 days. In addition, there were 2.82m day visits generating £104m in tourism spend. The combined number of visitors was 3.33m (up 1.9% compared to 2018). The combined economic impact of staying visitors and day visits was £272m (up 3.2% compared to 2017) and 3,314 FTE jobs.

Compared to 2019, Fylde saw a 65.2% decline in day visitors in 2020, recording just 980k day visitors. The number of staying visits only reached 210k, down by 59% compared to 2019, with the majority of visits occurring during the first quarter. Visitor expenditure saw a similar decline.

The table overleaf compares the 2018 STEAM data (given that STEAM data was available for all areas for this year) for Fylde, Blackpool and the whole of Lancashire. In percentage terms, Fylde saw an equivalent decline in tourism volume and value in 2020 as Lancashire and Blackpool did with all areas similarly affected by both national lockdowns and strict higher tiers lockdowns.

FYLDE - Volume			
	2018	2020	%Δ 18/20
Staying visitors (m)	0.52	0.21	-59%
Day visitors (m)	2.75	0.98	-64%
Total visitors (m)	3.27	1.19	-64%
FYLDE - Economic Impact			
	2018	2020	%Δ 18/20
Staying visitors (£m)	164	75	-54%
Day visitors (£m)	99	37	-63%
Total visitors (£m)	263	112	-58%

LANCASHIRE - Volume			
	2018	2020	%Δ 18/20
Staying visitors (m)	8.2	3.2	-62%
Day visitors (m)	60.5	18.2	-70%
Total visitors (m)	68.7	21.4	-69%
LANCASHIRE - Economic Impact			
	2018	2020	%Δ 18/20
Staying visitors (£m)	2,230	922	-59%
Day visitors (£m)	2,179	690	-68%
Total visitors (£m)	4,409	1,612	-63%

BLACKPOOL - Volume			
	2018	2020	%Δ 18/20
Staying visitors (m)	3.44		
Day visitors (m)	14.78		
Total visitors (m)	18.22	6.0	-67%
BLACKPOOL - Economic Impact			
	2018	2020	%Δ 18/20
Staying visitors (£m)	1,049		
Day visitors (£m)	532		
Total visitors (£m)	1,581	588	-63%

As shown in the tables overleaf, Fylde receives:

- 5-6% of visitors to Lancashire;
- 6-7% of the economic impact; and
- 6% of employment.

Blackpool receives:

- 27-28% of Lancashire's visitors;
- 36% of economic impact; and
- 42-44% of employment.

2018	Outputs by Area	Visitor Numbers		Economic Impact		Employment FTEs	
		Share	Total	Share	Total	Share	Total
1	Blackburn with Darwen Borough Council	6%	4.4m	4%	£189.6m	4%	2,332
2	Blackpool Council	27%	18.2m	36%	£1,581.5m	42%	25,387
3	Burnley Borough Council	4%	2.6m	3%	£119.9m	2%	1,481
4	Chorley Borough Council	5%	3.6m	4%	£188.4m	4%	2,338
5	Fylde Borough Council	5%	3.3m	6%	£263.5m	6%	3,344
6	Hyndburn Borough Council	3%	2.1m	2%	£93.5m	2%	1,125
7	Lancaster City Council	11%	7.7m	11%	£478.6m	10%	6,209
8	Borough of Pendle	4%	2.8m	3%	£130.4m	3%	1,657
9	Preston City Council	10%	7.0m	7%	£330.7m	7%	4,045
10	Ribble Valley Borough Council	6%	4.4m	6%	£260.8m	6%	3,454
11	Rossendale Borough Council	2%	1.4m	1%	£63.6m	1%	816
12	South Ribble Borough Council	5%	3.4m	4%	£176.9m	4%	2,161
13	West Lancashire District Council	4%	2.9m	4%	£170.7m	3%	2,072
14	Wyre Borough Council	7%	4.8m	8%	£361.6m	7%	4,362
LANCASHIRE		100%	68.7m	100%	£4,409.6m	100%	60,782

2020	Outputs by Area	Visitor Numbers		Economic Impact		Employment FTEs	
		Share	Total	Share	Total	Share	Total
1	Blackburn with Darwen Borough Council	5%	1.1m	3%	£55.8m	3%	691
2	Blackpool Council	28%	6.0m	36%	£588.0m	44%	10,281
3	Burnley Borough Council	3%	0.7m	2%	£34.5m	2%	435
4	Chorley Borough Council	5%	1.1m	4%	£64.3m	3%	805
5	Fylde Borough Council	6%	1.2m	7%	£111.9m	6%	1,435
6	Hyndburn Borough Council	2%	0.5m	2%	£28.0m	1%	324
7	Lancaster City Council	12%	2.5m	12%	£192.1m	11%	2,566
8	Borough of Pendle	3%	0.7m	2%	£39.2m	2%	517
9	Preston City Council	11%	2.3m	7%	£115.2m	6%	1,405
10	Ribble Valley Borough Council	6%	1.3m	6%	£91.8m	5%	1,275
11	Rossendale Borough Council	2%	0.4m	1%	£19.4m	1%	249
12	South Ribble Borough Council	5%	1.0m	4%	£58.2m	3%	726
13	West Lancashire District Council	5%	1.0m	4%	£67.5m	4%	817
14	Wyre Borough Council	7%	1.5m	9%	£147.1m	7%	1,742
LANCASHIRE		100%	21.4m	100%	£1,613.2m	100%	23,270

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There are few published visitor profiles for Fylde. Based on the NWDA Staying and Day Visitor Survey (2010) and Fylde Borough Council Visitor Survey (1995) the following can be gleaned regarding Fylde’s traditional visitor profile, which may now be somewhat outdated:

- the majority of visitors to Fylde arrive by car or coach group;
- nearly half of all visitors are aged 65+ with most traveling as a couple;
- there is a high percentage of repeat visits, especially to St Anne’s and Lytham;
- people are attracted by the peace, quiet, scenery and accessibility;
- about 50% of all day visitors are on holiday in Blackpool, visiting Fylde for the day; and
- the most popular market segment to Fylde are ‘Habituals’, who can be described as “low spending, largely inactive, very traditional, reluctant to change and valuing relaxation, peace and quiet”.

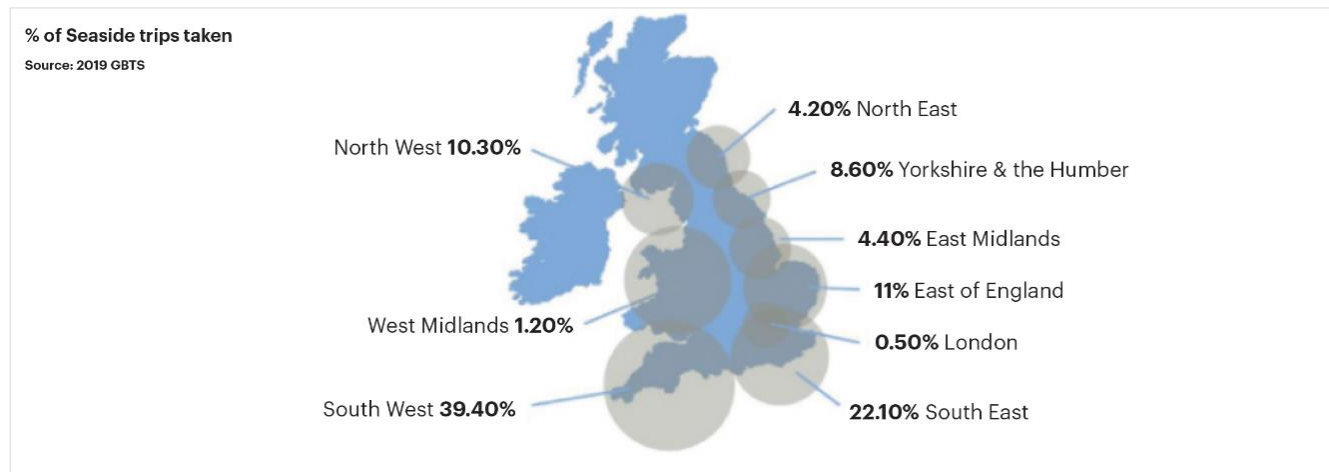
2.4 Seaside tourism trends

In June 2020, written evidence submitted to UK Parliament by the National Coastal Tourism Academy (NCTA) highlighted that:

- coastal tourism pre-Covid was valued at £17.1bn in UK and £13.7bn in England;
- in 2019, the English coast received 21m domestic overnight visits and 169m day visits; and
- in addition, the English coast also welcomed 10% of all inbound trips and 36 % of all inbound spend.

Tourism traditionally accounts for a high percentage of employment in seaside towns, on average c. 15-20% direct tourism employment, rising up to 50% in some coastal communities in the Southeast.

Although the South West (39%) and South East (22%) are the most popular destinations for seaside tourism, the North West ranks 3rd in the UK with 10.3% of 2019 domestic tourism trips taken in the North West (see image below).



The ‘typical’ visitor demographics for coastal tourists (based on GBTS 2019 data) are:

- the coast appeals to visitors of all ages, but is somewhat skewed towards families and older visitors: 16-34 year olds make up 23.5% of domestic overnight visits), whilst 35-54 are the largest visitor group (39.7%) followed by 55+ year olds (36.7%); and
- the coast also appeals across all socio-economic groups but AB (33.4%) and C1 (30.8%) are more represented than C2 (20.1%) and DE (15.6%).

Coastal tourism in England is highly seasonal but some shifts in seasonality already were noticeable as a result of investment in research, product diversification and targeted marketing. In 2013, the summer season (July and August) still accounted for 36% of all visits to coastal areas. In 2018, this percentage had dropped to 32%. Nonetheless, 84% of all visits still take place between March and October, which meant that the Covid restrictions and lockdowns in 2020 had a particularly devastating impact on coastal communities reliant on the tourism sector.

The NCTA estimate that the acute impact of Covid-19 on coastal tourism in England (as of November 2020) resulted in a £8.27bn loss in tourism spend, 110m fewer visits and job losses of c. 145,000.

Some market trends that already became noticeable before the Covid pandemic:

- there are opportunities for **off-peak growth markets**, notable people among younger people (16-34), those aged 55 as well as for more active tourism, sustainable tourism and slow tourism products that appeal to these groups;
- for a number of years established seaside destinations have seen a **reduction in coach tourism and the groups market; and**
- the educational market and **conferencing and business events market also have seen a decline.**

At the same time, the Visit England/Visit Britain consumer trackers have demonstrated that coastal destinations are rising in appeal among UK residents.

In order to return to pre-Covid coastal tourism levels, a three-year recovery campaign is proposed along with the need to rethink product propositions and product diversification whilst, at the same time, dealing with the more immediate challenges such as rising supplier costs, recruitment issues and continued seasonality.

Although the overall forecast for coastal tourism is that pre-Covid levels won't be achieved until at least 2023/2024, some 59% of coastal businesses reported that they already had a better summer in 2021 than they had in 2019, with 47% of business back to break-even.

2.5 Hotel occupancy

In this Section, we provide an overview of the performance of an anonymised sample of larger hotels in the area from 2017 through to 2021, including commentary on the impact of the Covid pandemic.

As can be seen in the table below, the local hotel sector was considerably affected by venues being forced to close for several months in 2020 due to Covid restrictions, with the North West experiencing some of the highest number of days under the toughest lockdown restrictions (highest tier) in the country, resulting in a 36% decline in occupancy and RevPAR (revenue per available room), a similar decline to the average decline in room occupancy experienced across England (40% decline).

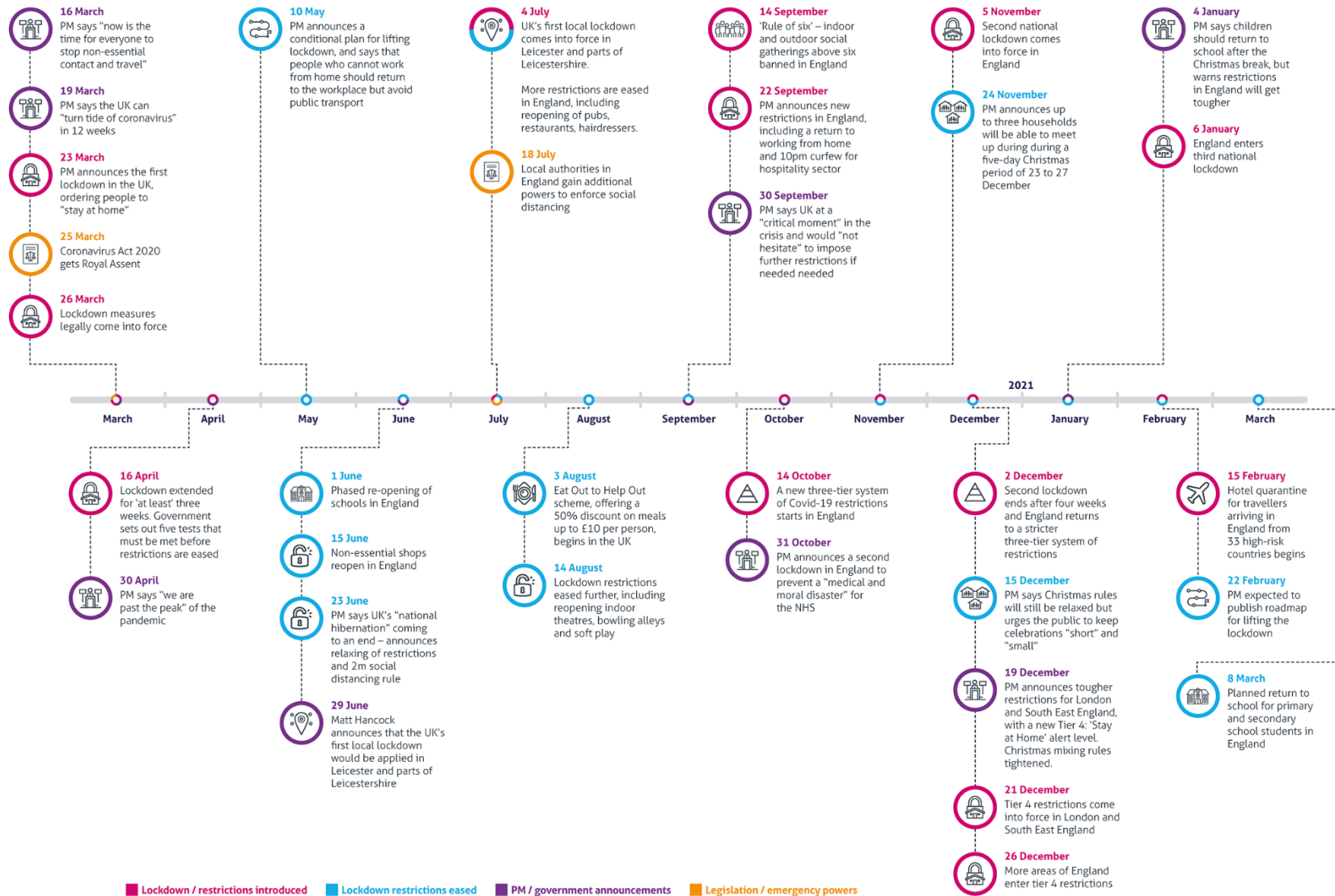
	Occupancy	Δ	ADR	Δ	RevPAR	Δ
Year	%		£		£	
2017	69.8		62.19		43.38	
2018	70.8	1.4%	63.68	2.4%	45.09	3.9%
2019	74.2	4.8%	64.48	1.3%	47.82	6.1%
2020	47.3	-36%	64.77	0.4%	30.61	-36%
2021 YTD*	65.3	38%	101.32	56.4%	66.11	116%

Source: STR, anonymized sample of local area hotels. 2021 includes up until the end of November 2021

The impact of the Covid lockdowns (timeline image overleaf) is reflected in monthly occupancies in 2020 (see table below). Before the lockdown in March 2020, the early months of January and February were on par with room occupancy recorded in 2018 and 2019. As the first national lockdown gradually came into effect from the first social distancing measures on 16 March 2020 through to the eventual full lock down on 23 March 2020, monthly occupancy dropped from the historic range of 62-67% to just 38.6%. During the height of the pandemic from April to June 2020 when accommodation businesses were temporarily closed, the fall in occupancy was dramatic. With the lifting of restrictions in early July 2020, the summer months saw an upturn in room occupancy although occupancy levels were still below normal levels for this time of year. The last quarter of 2020 saw room occupancy decline once again with the strictest tier system in place across the North West before further restrictions were introduced more widely around the country.

Occupancy												
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2017	51.0%	71.0%	67.1%	73.3%	72.7%	78.6%	86.6%	86.5%	82.9%	84.1%	71.9%	58.4%
2018	49.9%	62.2%	62.4%	64.6%	69.4%	72.6%	84.2%	84.6%	79.4%	83.7%	68.9%	57.4%
2019	54.6%	64.7%	65.8%	71.3%	79.6%	80.3%	85.7%	88.1%	84.5%	86.8%	68.5%	60.6%
2020	54.0%	61.6%	38.6%	0.0%	0.0%	0.0%	50.1%	69.7%	74.9%	41.0%	31.9%	24.9%
2021	24.3%	30.1%	41.3%	37.0%	46.4%	67.9%	79.5%	86.7%	77.5%	76.7%	70.3%	

Source: STR, anonymized sample of local area hotels. 2021 includes up until the end of November 2021



Source: Institute for Government analysis.

A similar picture (see table below) emerges for ADR (average day rates) showing a total drop-off during the first Covid lockdown followed by very strong levels of recovery when the hospitality sector was permitted to re-open from 4 July 2020. This mirrors what could be observed around the country with the ADR gap between the regional UK markets and London reducing as well as regional leisure-led holiday locations outperforming those of larger urban centres, highlighting pent-up domestic tourism demand. Strong staycation demand and a temporary reduction of VAT (to 12.5%) pushed ADR even higher in summer 2021.

ADR												
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2017	£46.12	£47.13	£46.37	£60.66	£62.89	£57.09	£74.58	£72.07	£69.95	£67.20	£52.18	£52.81
2018	£46.15	£48.91	£51.43	£57.57	£64.88	£61.23	£69.66	£80.17	£71.62	£72.87	£57.05	£54.50
2019	£47.37	£51.02	£52.56	£65.69	£71.84	£62.90	£73.27	£81.50	£68.98	£74.07	£55.49	£51.10
2020	£47.69	£52.47	£49.53				£69.28	£88.01	£79.81	£77.54	£58.17	£56.19
2021	£53.36	£53.92	£54.83	£65.30	£83.17	£93.67	£113.01	£128.48	£111.01	£113.96	£79.82	

Source: STR, anonymized sample of local area hotels. 2021 includes up until the end of November 2021

The table below shows that there was a noticeable shift in 2020 with reduced occupancy rates overall (due to lockdown periods and social distancing measures resulting in fewer rooms being taken into operation) but also lower weekend occupancies. By 2021, driven by leisure demand, the pre-pandemic weekend market had returned but weekday occupancy also held up strongly.

Occupancy				
Day	2018	2019	2020	2021
Sun	61.9%	65.1%	40.9%	58.2%
Mon	65.7%	68.9%	45.0%	62.6%
Tue	70.2%	73.9%	47.1%	67.0%
Wed	68.7%	72.6%	47.2%	66.2%
Thu	64.2%	67.9%	43.9%	61.5%
Fri	78.3%	81.0%	51.1%	69.0%
Sat	86.5%	89.7%	55.4%	72.3%

Source: STR, anonymized sample of local area hotels. 2021 includes up until the end of November 2021

2.6 St Anne’s geographical context

The Borough of Fylde is located in the County of Lancashire in the northwest of England and fronts onto the Ribble Estuary and the Irish Sea. To the north is the Borough of Wyre, to the northwest is the popular resort town of Blackpool and Preston adjoins to the east. It has an area of approximately 62 square miles (166 square kilometers).



Fylde consists of the major conurbations of Lytham, St Anne’s, Kirkham and Freckleton along with rural countryside and small villages in the hinterland but the coastline is arguably the most dominant feature of the Borough.

In 1922, the two coastal towns of Lytham and St Anne’s were amalgamated to create the Borough of Lytham St Anne’s. Together, Lytham and St Anne’s have a reputation as a high quality resort, particularly known for its strong golfing tradition (with four championship courses located within a five mile radius), yet there are distinct differences between the two towns.

Lytham developed from an ancient settlement but is primarily Victorian in character with an attractive Victorian shopping centre and an expansive seafront. Adjacent St Anne’s was only established in 1875, with its street layout planned to a grid. It subsequently developed as a family holiday resort with a pier, hotels and an attractive promenade. Both Lytham and St Anne’s have a gentler and more peaceful character than their vivacious neighbour, Blackpool, six miles to the north.

The 12 mile (18km) stretch of coastline, which falls within the jurisdiction of Fylde Council, comprises broad open beaches, the largest area of Lancashire’s remnant sand dune system and extensive salt marshes on the northern bank of the mouth of the Ribble Estuary - an important site for migrating waders and wildfowl.

The Borough of Fylde is home to regionally significant business sectors, including the BAE aerospace facility at Warton and the Westinghouse nuclear facility at Salwick (Springfields). The presence of these sectors means that the Borough is at the heart of high-value manufacturing for both the sub-region and the region, with a relatively high proportion of manufacturing jobs and low level of unemployment.

St Anne’s is served by both main roads and public transport, predominantly from Blackpool and Preston. St Anne’s is on the Blackpool South to Preston railway line and has its own railway station. Service is generally hourly from Monday to Saturday. Blackpool Airport is a 10-min journey by car or 30-minute journey by bus. In 2021 work started on a new motorway link road connecting the M55 to the Lytham St Anne’s area. It is expected to open in early 2024 and improve connectivity from the M6 to the coast. However, overall public infrastructure links are weak and rural road infrastructure is outdated.

2.7 Local area demographics

Local activity is often a critical success factor for seaside destinations. Local people help to sustain the destination in off-peak and shoulder months; they are most likely to attend special events and can help to sustain commercial facilities within attractions such as play facilities, shops, cafés and any facilities for hire. Local residents stimulate VFR³ tourism and can be important ‘ambassadors’ for the destination, which can often extend into volunteering, donations and other forms of support.

The Fylde coastal plain in West Lancashire consists of the Borough of Fylde (covering the south of the Fylde plain), Blackpool to the west and Wyre to the north.

As revealed by the 2011 Census, there are strong commuter flows between the three Fylde Coast local authorities of Fylde, Blackpool and Wyre, with over 7,000 Blackpool residents commuting to Fylde⁴ and more than 5,000 travelling in the opposite direction. The differential in workday population is greatest among 20 to 39-year olds (30% higher than the usual resident population).

These commuter flows push the workday population for Fylde to a much higher figure than the usual population of which stood at 75,757 at the time of the 2011 Census and has grown to 81,200 in 2020 (equivalent to 5.5% of Lancashire’s total population).

Lancashire County Council estimates that between 2018 and 2043 the population of Fylde will increase by 16% (compared to a 7.2% rise over the same period for the whole of Lancashire), reaching 92,500 by 2043. The number of households is expected to rise by 24.6% from 37,660 to in the same period 46,913, with much of this increase anticipated to be in households aged 65 and over.

³ VFR – Visiting Friends and Relatives

⁴ Note: BAE Military Air Solutions has a major site, at Warton in the Fylde.

The 2016 **MOSAIC**⁵ **population profile** for the Fylde local authority area shows above average representation across the following groups:

- *Senior Security* (17.8% of population vs 7.6% national average): defined as ‘elderly singles and couples who are still living independently in comfortable homes that they own’. 90% are aged 65 and above. Property equity gives them a reassuring level of financial security, with comfortable incomes far above the state pension. They enjoy researching their family history, which is of particular relevance for Fairhaven Lake and Gardens.
- *Prestige Positions* (12.1% of population vs 7.1% national average): defined as ‘affluent married couples whose successful careers have afforded them financial security and a spacious home in a prestigious and established residential area. While some are mature empty-nesters or elderly retired couples, others are still supporting their teenage or older children’. 24% have professional qualifications. 55% own two or more vehicles. 44% have an income of over £70k per year.
- *Suburban Stability* (11.5% of population vs 5.9% national average): ‘typically mature couples or families, some enjoying recent empty-nest status and other with older children still at home. They live in mid-range family homes in traditional suburbs where they have been settled for many years. They are likely to be working in skilled trade occupations. 25% of them earn between £40k and £50k per year.
- *Domestic Success* (10.7% of population vs 8.6% of national average): defined as ‘high-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods. Their busy lives revolve around their children and successful careers in managerial and professional roles’. They are likely to be earning over £50k per year and enjoy frequent visits to the cinema and other family day out activities.

These four groups also make up the largest groups within the Fylde area and account for a total of 39,895.

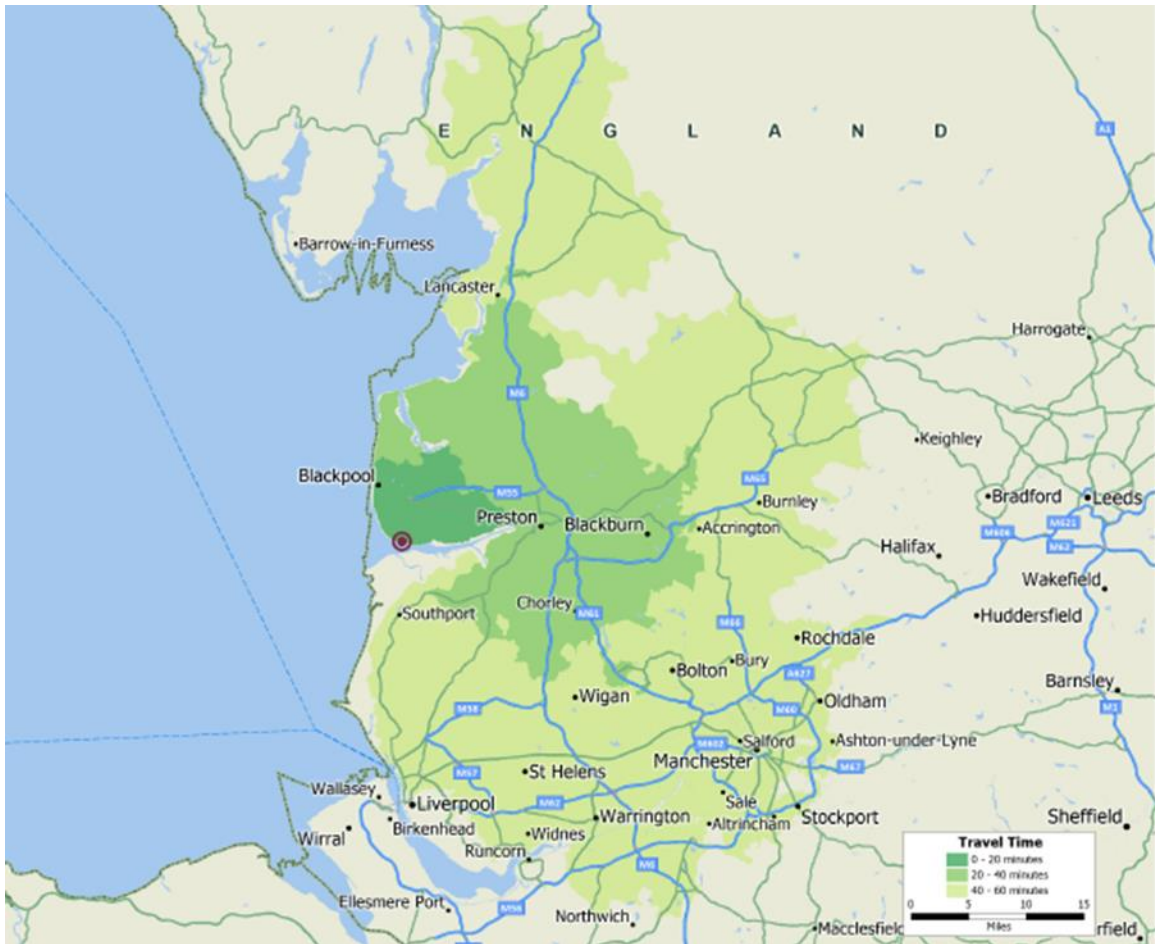
Fylde’s MOSAIC profile also shows above average representation of *Vintage Value* (7.7% of population vs 6.0% national average). This group is defined as ‘elderly people who most likely live alone, either in social or private housing, often built with the elderly in mind. Levels of independence vary but with health needs growing and incomes declining, many require an increasing amount of support’. They are less confident with new technology, make limited use of the internet and are least likely to have a mobile phone. They have low incomes and are often reliant on a state pension.

Conclusion: Fylde has a relatively affluent local population of approximately 82,000 which is skewed towards older people and those who are highly skilled and educated. The challenge lies in simultaneously responding to the needs of younger people who may not have fond memories of family trips to Lytham and St Anne’s.

⁵ A consumer segmentation model designed by Experian, based on the most comprehensive data (49.7m adults and 25.2m households) which segments the population into 15 groups and 66 types to aid understanding of likely consumer behaviour.

2.8 Wider catchment area

As illustrated in the map below the 60-minute drive time (the maximum time most people would want to travel for a day trip) catchment area from St Anne’s stretches north to include Lancaster, Carnforth and the outskirts of Morecambe, east to Clitheroe, Burnley and Preston and south to Bolton, Wigan and the outskirts of Stockport.



The total (2016) population living within an hour of St Anne’s is over 4.7m living in just over 2m households. However, within a 20-minute catchment, the population amounts to fewer than 200,000 people.

Population and no. of households within the 60-min catchment area of St. Anne’s		
	Population within each 20-min catchment	Households within each 20-min catchment
0 - 20 minutes	190,489	86,428
20 - 40 minutes	733,011	303,995
40 - 60 minutes	3,835,417	1,621,996
Total	4,758,917	2,012,418

The table below compares and contrasts some key socio-demographics across the three 20-minute drive time catchment areas. Noticeable differences predominantly relate to a rising BAME population among the further catchment bands as well as fewer people aged over 65 compared to the 20-minute catchment area.

Socio-demographics of population within the 60-min catchment area of St. Anne's			
	0-20 minutes	20-40 minutes	40-60 minutes
Children < 10	20,258 (11%)	85,955 (12%)	468,643 (12%)
Children 10-17	17,401 (9%)	71,600 (10%)	374,187 (10%)
Young adults 18-24	15,153 (8%)	71,721 (10%)	383,136 (10%)
65 and above	38,493 (20%)	125,208 (17%)	593,813 (15%)
BAME	3,936 (2%)	78,457 (11%)	404,544 (11%)
Level 4 qualification	33,116 (17%)	145,377 (20%)	718,595 (19%)
Unemployed	7,177 (3.8%)	20,475 (2.8%)	141,557 (3.7%)
Total population	190,489	733,011	3,835,417

2.9 Local area business profile

2.9.1 Introduction

As part of this Visitor Economy Assessment, AMION Consulting undertook consultations with a small number of key businesses in St Anne's.

Despite repeated requests for consultations, the number of responses was somewhat disappointing. Nevertheless, the input that was achieved provided a consistent message and can be considered robust with the caveat that it is not unusual for high performing businesses to be more prepared to engage in discussions, so the analysis may be overly positive. It is to be hoped that more businesses will engage at the next phase.

Details of consultees and the contact process can be found in the Appendix.

2.9.2 Business performance and confidence

Overall, business performance is relatively strong and there is confidence going into 2022. This is despite the arrival of the Omicron variant and the uncertainties and cancellations it brought during the consultation period.

Headline findings include:

- the post-Covid leisure market recovery has been very strong with regular 100% weekend and school holiday occupancies reported by accommodation businesses;
- however, the midweek corporate and business market has collapsed. Pre-Covid, the corporate market had provided up to 45% of total business; this has now declined to between

15% and zero. Some local business demand has returned but the national corporates are no longer providing any customers to the hotels and serviced apartments;

- confidence levels are high, with a largely unspecified desire to invest in further projects in the town and wider borough. This is true for both accommodation and non-accommodation businesses. As an example a recent investor in the town stated that it was an ‘easy decision to invest significantly’ and described St Anne’s as a ‘fantastic destination’;
- the accommodation sector in St Anne’s is dominated by a small number of long-established, family-owned businesses who are closely connected to one another. This is indicative of a successful destination and may also explain the high confidence levels as reserves will have built up over many years and there is likely to be relatively low levels of borrowing, all of which will have assisted those businesses to weather the Covid storm; and
- leisure businesses benefit from a relatively affluent local market which supports the income from visitors and provides year-round customers.

Occupancy data was provided by one business, from which we have developed an estimated range of occupancies in the town over the last four years. In the table below they are compared to the national United Kingdom Occupancy Survey (UKOS), delivered by the four national tourist boards. The table demonstrates the impact of pandemic. In 2018-2019, St Anne’s underperformed compared to the national average, largely due to the high occupancies that can be expected in the major towns and cities. In 2020-2021, during the Covid pandemic, this situation reversed as corporate travel was reduced and leisure visitors were more drawn to the coast and countryside.

Year	St Anne's		UKOS (%)
	Min (%)	Max (%)	average (%)
2018	65	70	77
2019	70	75	76
2020	45	50	37
2021 (Q1-Q3)	65	75	N/A

2.9.3 Market mix

The markets attracted to St Anne’s are to a large extent product-driven. For example, establishments with swimming pools and a good supply of family rooms will attract families, whereas those that predominantly provide double rooms and set out to attract couples are more successful in appealing to the couples market. In addition, the marketing message is also key. The loyalty and maturity of the market in St Anne’s mean that this level of differentiation can be expected. The primary research will provide important and robust data to compare with these findings.

Demand characteristics for the businesses who were consulted in St Anne’s are identified below:

- families, especially intergenerational groups, visiting for special occasions or regular ‘family weekends’;

- couples – both pre- and post-families with younger couples in their 20’s and older customers in their 60’s and 70’s;
- functions and Weddings are an important part of the market mix for those businesses who have invested in dedicated facilities (for example, large function rooms) although social groups have been in decline;
- golf tourism to St Anne’s is minimal but lucrative for those businesses who specialise in it;
- the Day Visitor Market and Staying Visitor Market have largely complementary characteristics - this applies to socio-economic characteristics, group size and geographical source markets (all to be tested further by the primary research);
- key geographical source markets include: East Lancashire, Greater Manchester, Liverpool and Scotland (to be tested further by the primary research); and
- Blackpool connection – up to 40% of total business is linked to Blackpool. St Anne’s functions as a higher quality accommodation base for customers who prefer not to stay in Blackpool and/or as a displacement location. Displacement occurs particularly during major events in Blackpool especially dance competitions. St Anne’s businesses don’t necessarily depend on Blackpool, but the (day visit) proximity of Blackpool is an added attraction for some visitors;
- St Anne’s is considered to offer higher quality accommodation than both Lytham and Blackpool and is more suitable for families – St Anne’s is also ‘quieter’ than Lytham and Blackpool especially;
- the more upmarket nature of the St Anne’s offer supports profitability and ongoing investment in the accommodation supply; and
- there is a loyal and mature market for St Anne’s, attracting significant numbers of repeat visitors.

2.10 SWOT

We present overleaf our baseline analysis in the form of a Strengths, Weaknesses, Opportunities and Threats (SWOT) table based on the consultation findings and our own assessment of St Anne’s.

Strengths	Weaknesses
<ul style="list-style-type: none"> • St Anne’s offers ‘All day’ beach • St Anne’s Fylde Coast USP • Wider Fylde coast offer is complementary, currently: St Anne’s = accommodation & food Lytham = food & shopping Blackpool = entertainment • Upmarket & profitable accommodation offer, with high percentage of leisure visitors (less vulnerable than business tourism markets) • Strong locally owned and/or independent business base • Confidence amongst accommodation owners is high with investment plans either underway or in development • Consensus on the need to be radical with the development of the Island • High number of loyal staying visitors making high numbers of repeat visits • Evidence of strong recovery post Covid 	<ul style="list-style-type: none"> • Beach and town links: disconnected and dilapidated, which limits tourism impact and cross-visitation between both parts of town • Parking – supply, location and ‘2 tier’ management regime • Clifton Drive is a particular concern • Pier is under used and in poor condition • Poor pedestrian flows and layout/design • Street lighting is dark • St Anne’s retail offer is mixed or poor with some ‘value’ operators in key locations • Lack of national/international branded accommodation • Poor Catering/retail business survival rates • Timing (and location) of events • Council service is under resourced • Tourism ‘leadership/advocacy’ is comparatively weak
Opportunities	Threats
<ul style="list-style-type: none"> • Potential for spa/wellness facilities including Hydro Hotel (with some developer interest) • Beach could be improved/celebrated with complementary development • Island development should reflect chosen positioning (e.g. family resort/beach or spa/wellness) • New businesses opening e.g. boutique ‘spa’ in JR Taylor building • Make more of train and golf course - currently perceived as ‘constraints’ e.g. extend train to Fairhaven and improve golf course with branded offer • Out of season events (funding required) • Wind and beach-based sports • Coastal defence works to include commercial opportunities • Provide more appropriate/higher quality facilities for motor homes • Masterplan to propose more flexible use of town centre e.g. for small scale events (also for Island site) • Utilise ‘nostalgia’ and traditional seaside experience with new ‘twist’ e.g. Beach Huts • Emerging ‘vintage’ and antique retail offer • Complimentary development opportunities in line with the ongoing regeneration of Blackpool (including the extension of the season) • Opportunity to develop higher end leisure facilities to meet market profile 	<ul style="list-style-type: none"> • Traditional Group market in decline (social groups and coach markets) • Lack of new customers • Coastal defence works could be a physical barrier • Complex ownership of Island site inhibiting comprehensive/strategic improvement and business investment • Events-weather dependent and, therefore, risky

2.11 St Anne’s positioning

There are several strategic documents that touch on the current positioning of St Anne’s and how the resort destination fits within the wider strategic direction for the Fylde and Lancashire areas.

Fylde Council Local Plan (2015 - 2032)	Fylde Coastal Strategy (2015 - 2032)	Fylde Economic Development Strategy & Action Plan (2012- 2030)
<ul style="list-style-type: none"> • Lytham and St Anne’s is identified as 1 of the 4 Strategic Locations for development in Fylde. • By 2032, "The Island Sea Front Area and the Promenade Gardens at St Anne’s and Fairhaven Lake will have been regenerated to provide a high quality visitor experience". • By 2032, "Lytham and St Anne’s will be thriving resorts with quality specialist shops, ... having retained and enhanced their positions at the top of the retail hierarchy and ...strengthened the area’s resort appeal". • Strategic Objective 4: "Promoting the image of the classic seaside resort of St Anne’s, which builds upon the heritage assets including the Promenade Gardens and Ashton Gardens and the Pier; and the Victorian, Edwardian and Interwar architecture of the Conservation Areas". • The promotion and enhancement of rural tourism will be encouraged by creating small-scale, sensitively designed visitor attractions which promote active tourism and provide opportunities to access, learn about and conserve the natural and historic environment. • High quality serviced accommodation (e.g hotels) will be encouraged in the holiday areas in St Anne’s. 	<ul style="list-style-type: none"> • The wide sandy beaches of the Lytham St Anne’s coast provide a major tourism asset, helping to support local businesses and seasonal employment. • The beaches are a place of solitude away from areas of population. People enjoy walking beaches year round. • Commercial organisations, recreational groups and individuals all use the coast for enjoyment through a wide variety of activities. Activities can range from traditional recreational pastimes such as enjoying the views, sightseeing and beach games, to more active ones such as kite surfing and wind bugging. • Lytham is a traditional coastal town which is steeped in heritage and was recently voted by the Royal Horticultural Society ‘One of the greenest, cleanest and most beautiful places to live’. • St Anne’s is a traditional seaside town for young families and discerning visitors who want a more serene break than offered by its neighbour, Blackpool. • Key action: Maintain a vibrant, diverse daytime and evening visitor economy. • Key action: Encourage a range of fine dining experiences across the coast. • Key action: support cultural and sporting events that raise the profile of the area. 	<ul style="list-style-type: none"> • Promote new segments of the visitor market to include eco-tourism and market the natural beauty of the Fylde. • Restore the historic heritage assets and attractions of Fairhaven Lake and St Anne’s Promenade Gardens. • Promote new segments of the leisure market, including beach sports, and support events at the international, national and local level. • Develop the proposals for the establishment of a ‘Classic Resort’ for St. Annes. • Prepare a public realm plan for St Anne’s to support its role as a Classic Resort. • St Anne’s Town Council to continue to develop events programme and marketing activity with partners.

Fylde Coast Sub-regional Visitor Accommodation Study (2009)	St Anne’s Seafront Masterplan (2008)	Lytham St Anne’s 2020 Vision and 'Classic Resort' status (2009)
<ul style="list-style-type: none"> • There is greater provision of timber holiday lodge accommodation in Fylde. This reflects that St Anne’s and Lytham are generally popular with more affluent visitors than stay in Blackpool. • Serviced holiday accommodation in Fylde is dominated by the resort of St Anne’s, with a smaller number of businesses in Lytham. • Holiday park pitch provision is predominantly located close to the boundary with Blackpool. • HLL estimates that Fylde’s accommodation market is broadly in balance at the current time, with just a slight excess supply across the serviced and self-catering sectors and a slight under-supply of holiday park pitches. • Primary holiday areas should be restricted to serviced accommodation, in order to prevent hotels being redeveloped for holiday apartments as a first step towards residential development. • The ‘Classic Resort’ concept for Lytham St Anne’s is based around the idea that a hallmark award could be awarded to resorts able to demonstrate high standards, providing the visitor with an exemplary experience. 	<ul style="list-style-type: none"> • The most distinctive feature of St Anne’s seafront are the Promenade Gardens, recorded on the English Heritage Register as Grade II ‘gardens of special interest’. • Although investment is needed, the gardens as they stand are a remarkable survival and continue to contribute to the character of St Anne’s seafront. • The most successful elements of St Anne’s seafront belong to the original layout: architecturally consistent promenade frontage, ornamental garden area/promenade, beach. • The pier is an entertainment focus and landmark. The combination provides a setting for passive seaside entertainment and has the virtue of simplicity, connecting easily with the town and surrounding landscape. • Although strong commercial attractors, the leisure developments on The Island site (Pleasure Island and Salters Wharf) are unsuccessful in townscape terms, lacking presence as landmark buildings and hemmed in by kiosks, railings and weak public spaces. • The miniature golf course is an original feature but is not well integrated into its surroundings. • Market testing results showed interest among others for a quality, branded hotel, a health and fitness club, a visitor attraction relating to St Anne’s golfing heritage and re-opening of the casino. 	<ul style="list-style-type: none"> • To position Lytham St Anne’s as the jewel of the NW coast. • To pioneer the 'Classic Resort' concept (as originally developed by the NWDA in 2003) within Lytham St. Annes • Promote the concept of the '4-star seafront' • Nurture a 'fine food' cluster including more high quality places for al fresco eat & drink (eg St Anne’s Square) • Make the resort exceptionally cycle friendly • The current and future target market of Lytham St Anne’s is 'Traditionals' (particularly for accommodation), 'Cosmopolitans' and 'Discoverers' (town centre offer) plus the golf market. • "Lytham St. Annes should be a unified destination brand from the point of view of marketing". • St. Annes has a distinctive quality as a 'garden town', with Fairhaven as an important destination for the Ribble Coast and Wetlands. • St. Annes and Lytham will be important elements of the resort ‘necklace’ concept. • The problem remains, however, that large areas of the public space in St Anne’s remain in a poor visual condition. • Project A: "By 2020, St Anne’s would be fully developed in line with the 'Classic Resort' ambition, including preparation and implementation of a masterplan for the seafront area, a series of key private sector developments and public realm improvements creating a high quality setting for retail, entertainment and culture.

Marketing and promotion of St Anne’s is currently provided through:

- **Visit Lancashire.** Lytham St Anne’s is promoted as a unified destination brand: “The dual seaside towns are nestled along a picturesque stretch of coastline lined with well-tended lawns, a boating lake and pretty parks”.

The link to a ‘24 hours in Lytham & St Anne’s’ online guide is somewhat outdated (2017) and focuses on Lytham St Anne’s as a ‘sophisticated seaside town’ with ‘award winning’ beach huts, stylish beach apartments, art exhibitions at Fylde Gallery and a spa treatment at Ribby Hall Village.

It is hard to find specific information about St Anne’s on the Visit Lancashire page, with only limited listings for things to do, places to stay or eat.

- **Discover Fylde,** developed and maintained by Fylde Council provides a far superior overview of the villages and towns in Fylde, including how Lytham and St Anne’s are closely linked but each with a distinct identity.

“Imagine yourself on the perfect sandy beach with beautiful blue sea, wide open golden sands backed by dunes; take a deep breath and imagine the freshness of salty sea air and listen to the laughter of your family and friends. St Anne’s-on-the-Sea’s town centre and the beautiful Ashton Gardens have been regenerated over recent years to offer a charming experience, blending heritage with modern living.”

“St Anne’s-on-the-Sea offers traditional seaside family fun with a modern twist and whether you’re strolling along the Prom, kite surfing or enjoying listening to a traditional brass band, we’re sure you’ll agree it’s a great place for a short break”.

The website has an extensive overview of places to eat or stay and things to do in St Anne’s.

- **Visit St Anne’s,** part of seven interlinked Visit Fylde Coast magazine style websites developed and maintained by The Rabbit Patch, a private company, as go-to online place for information about things to do along the Fylde coastline.

Visit St Anne’s positions St Anne’s as “the family friendly seaside town on the north west UK coast ... with miles of golden sand beaches, its own pier and seafront attractions.

The website is up-to-date (January 2022) and links to various upcoming events including St Anne’s Food and Drink Festival (April) and St Anne’s International Kit Festival (September) and updates on the Fairhaven Lake restoration.

Overleaf is a table with the main events for Lytham St Anne’s. Most are aimed at a family audience and scheduled during the summer season, complimented with popular shoulder season events such as the St Anne’s Food & Drink Festival in April and St Anne’s Kite Festival in September.

Month	Event	Duration
April	St Annes Food & Drink Festival	2 days
May - Sept	Sunday Concerts in Ashton Gardens	1/month
June	St Annes Carnival	2 days
June	Mega Picnic Variety Concert (Queen's Platinum Jubilee)	1 day
June	The Amateur Championship (golf)	6 days
June/July	Lytham Festival (music)	10 days
July	St Annes Music & Arts Festival	3 days
July	Fylde Vintage, Steam & Farm Show	2 days
August	Fylde Council Golf Tournament	5 days
August	Lytham 1940s wartime weekend	2 days
September	St Annes September Spectacular	5 days
September	St Annes Kite Festival	3 days
November	Lytham Christmas Light Switch on	1 day

3 Future development options

In this Section, we consider a number of potential development themes which have resonance with St. Anne’s and may form part of the future masterplan options for the visitor economy. It provides an overview of key market trends and the existing offer in the town. As such, it provides some context for the options appraisal process which will follow at the next stage of the study.

3.1 Sand sports

The beach at St. Anne’s clearly offers great opportunities for wind-powered sports at the beach such as land-sailing, kite buggy, kite flying, beach volleyball and beach football as well as sandcastle building competitions and festivals.

Since March 2021, St Anne’s has had its own land-sailing club which provides training as well as social land sailing opportunities on the North Beach on most Wednesdays and weekends. In 2023, the European Championships in land-sailing, one of the largest international events in the sport, are even due to be held at St Anne’s. Over 150 competitors of all racing yacht classes from all over Europe will travel to St Anne’s for a week-long competition. The Wirral Sand Yacht Club, on Hoylake beach, hosted the event in 2007 and again in 2017.

In January 2022 Fylde Council announced plans for the development of a beach sports centre for sand, wind and water sports at St Anne’s North Beach as a venue for local clubs to host events and tuition, a café for the provision of refreshments for beachgoers and as a base of operations for the Council’s coastal and countryside ranger service. The centre is anticipated to be developed in two phases, with the first phase focusing on the refurbishment of the former Trax property in the St Anne’s North Beach car park as a basis.



Although it currently still lacks dedicated facilities, St Anne’s North Beach is already listed 7th in Red Bull’s ‘top 10 of UK kitesurfing spots’, renowned for its flat water lagoons as well as wave kite surfing at neighbouring Starr Gate (less suitable for beginners). Kite surfing at St Anne’s will work on anything from SSE clockwise all the way round to NW. The beach has a large tidal range so, at low tide, it can be a long hike to the water.

Blackpool Light Craft Club is located at the northerly end of North Beach and offers facilities such as changing rooms, a lounge area and a bar but only to members. Annual membership fees are £100 plus a single on-off £75 in the first season. The club house is used by kites, kayakers, jet skiers, scuba divers and small boat owners.

3.2 Spas and wellness

3.2.1 *The global picture*

The Global Wellness Institute (GWI) regularly publishes reports into the economic impact of wellness, and specifically into Wellness Tourism⁶. The GWI estimates that Wellness Tourism grew at 8.1% per annum between 2017 and 2019, declining by 39.5% in 2020. This growth is more than 50% higher than that for overall global tourism (5.2%). In Europe the growth rate was 6.9% with a reduction of 35.4% in 2020. In 2019, the total Wellness Tourism spend in Europe was \$160.3 Billion.

The(GWI) defines wellness tourism as ‘travel associated with the pursuit of maintaining or enhancing one’s personal well-being.’ It further divides the wellness tourism market in two: primary wellness, where visitors are motivated by wellness to take a trip or choose their destination based on its wellness offerings ad secondary wellness, where they seek to maintain wellness or engage in wellness activities during any kind of travel. The bulk of wellness tourism is done by secondary wellness visitors, who accounted for 89% of wellness tourism trips and 86% of spend in 2017.

The market for wellness tourism is dominated by domestic trips, involving 82% of overall trips and 65% of visitor spend.

Europe accounted for some 35% of the global market in 2017. The United Kingdom was 9th in the league table of wellness tourism destinations, with 23.2 trips generating \$13.5 US Billions of expenditure, supporting 200,000 jobs. Growth in the UK 20215-17 was 6.1%.

THE GWI estimated that, in 2017, spend per trip for wellness tourism was 178% of average tourism expenditure (domestic) and 53% more (international)⁷. In the UK this was estimated at \$405 per trip for domestic visitors and \$1,535 for international trips. For 2020, domestic spend remained very similar, at 177% of average spend (domestic).

It is noted that wellness tourism can contribute to a reduction in seasonality as ‘(coastal destinations can appeal to travellers who are looking for a more tranquil environment to destress or take a retreat in the wintertime.’

⁶ Global Wellness Tourism Economy 2018 and The Global Wellness Economy: Looking Beyond Covid December 2021

⁷ Compared to Euromonitor statistics

Spa tourism represents about 48% of total spend on wellness tourism, so is less than half the market.

Examples of destinations that have accrued significant benefits from wellness tourism include the Tirol region of Austria. Initially developed to reduced seasonality in ski resorts, the wellness cluster now extends to over 100 businesses based around specific ‘wellness hotels’.

The impact of the pandemic was more severe on primary wellness trips (as facilities were closed), leading to secondary wellness accounting for 92% of trips and 90% of expenditure. The relative reduction in trips between 2019 and 2020 were 56.8% (primary) and 33.2% (secondary).

Whilst the reports do not provide numerical forecasts, the authors are bullish about growth prospects, citing a massive increase in awareness and desire for health and wellbeing experiences, facilities and lifestyles which will inevitably spill over into higher levels of wellness tourism.

3.2.2 *The local/regional/historical context*

British Seaside resorts begin with the concept of wellness, providing places for health and relaxation away from cramped and unhealthy 19th century cities. The proximity to the sea (for bathing), access to clean air and space to promenade and relax were the basis on which resorts were developed and laid out. St Anne’s is a prime example, with its broad streets and pavements, seaside gardens and pier.

There is a cluster of facilities in St Anne’s that either already offer wellness products or could be adapted to do so. At least five local hotels have pools, four offer health treatments and two promote Spa breaks (see Appendix B for details). The former JR Taylor building is being developed into a boutique spa and one local operator has expressed an interest in developing a major hydro hotel, sensing a market opportunity. Accommodation based facilities are complemented by a range of non-residential local service providers.

The Island site, with its indoor swimming pool and outdoor lake, presents an opportunity to consider a central wellness/spa facility (to complement the existing operations) with indoor/outdoor swimming by the sea and a range of complementary treatments/therapies.

The ‘Therme’ development, currently under construction at Trafford City in Greater Manchester on a 28 acres site will include a diverse range of facilities including water-based activities with fitness programming, attractions, wellbeing therapies, multisensorial saunas, food and nutrition. The attraction will include a ‘family fun’ and ‘adults only’ area. This £250 million project is set to open in 2023, indicating a confidence in the wellness and activity market at a regional level.

3.3 **Boutique family leisure facilities**

The UK leisure market, both before and during Covid-19 has seen the emergence and growth in higher quality and more upmarket leisure facilities in town and city centre locations, relocating away from the traditional out of town leisure park concept. This is often - but not always - accompanied by a more edgy, younger adult orientated positioning. Operators include:

- Lane 7 Bowling – an integrated leisure experience offering bowling, darts, table tennis etc. with a licensed bar. The facilities become ‘Over 18 only’ after 7pm. There are currently 13 sites, including Manchester and Liverpool, with five in development.
- Everyman Cinema – Higher end luxury cinema with over 30 locations, including Liverpool, Manchester and Clitheroe. Premium pricing is combined with large seats and table food/drinks service.
- Hatchet Harry’s – axe throwing for ages over 8. Currently has five sites including Liverpool.
- Junkyard Golf – indoor crazy golf with six locations including Liverpool and Manchester - allows Under 18’s before 6pm Sunday-Thursday
- Multiple Escape Room operators where groups of friends/families etc. are challenged to escape within a time frame using clues and suggestions.

These specific offers are complemented by more multi-experience ‘competitive socialising’ operators such as Boom Battle Bar and Roxy Playground.

More locally, the Flower Bowl development at Barton Grange, has recently opened offering a premium cinema, curling rink, ten pin bowling, outdoor (covered) crazy golf and supporting restaurants. Whilst the recent Plan B restrictions will have hampered business performance, there is clearly a confidence that such a facility can be viable in the local area.

Although these locations are not coastal, the potential exists for a multi-operator facility to be considered for the Island site. The current offer of family dining (branded and locally-owned) and independent cinema could be augmented within a higher quality integrated building or buildings, complementing the day time and seasonal offer of the beach, extending the length of stay and creating a draw for new visitors to the town.

This potential new development would be supported by investment in other areas, providing higher quality play, leisure and catering facilities close to the beach. Consideration could also be given to investment in the golf course and the railway, with the latter being extended to the South, providing a potential park and ride facility with distinctive local transport.

3.4 Vintage and antiques

A further, if perhaps unusual approach would see St Anne’s focusing on its existing concentration of vintage and antique shops to create a distinctive retail environment in the town centre, complementing a traditional (but updated) seaside offer incorporating the pier, seafront gardens etc.

Google currently lists eight vintage and antique shops in St Anne’s, namely:

- Verdi Antiques;
- Very Vintage;
- Vintage at The Palace;
- Truscotts Antiques and Curios;

- Catherine’s Coffee Shop;
- SteWay Home and gifts;
- St George’s Emporium; and
- Horological Centre,

An example of a successful resort based around this approach is Margate in Kent. Anchored by the Turner Centre and Dreamland, restored in 2015 on site of a derelict theme park, which offers a combination of nostalgia and vintage activities, rides and amusements and more modern family experiences. Dreamland also hosts music events and art installations. Margate is home to a cluster of vintage shops and independent art galleries, all of which create a hipster, modern atmosphere at a traditional seaside resort.



Appendices

Appendix A – List of Consultees

Participants

Name	Business	Date
Stuart Robertson	Beach Huts / Beach Hut Apartments	17 th November
Andrew Whitaker	Mode Hotel	17 th November
Dan Yates/Sam Doublard	HY Hotel	16 th December
Victoria Cornwall	Glendower Hotel	23 rd November
Veli Kirk	Anatolia Restaurant/STEP	23 rd November
Paul Jervis	Island Cinema	9 th December
Chris Moor	Lindum Hotel/Inn Collection	Emailed questions 18.1 – responded 19.1

Did not Respond/Declined to Participate

Name	Business	Contact History
Ben Derbyshire	Dalmeny Hotel	Emailed 16.11, 19.11, 7.1 Rang, confirmed contact and emailed 3.12 Emailed re postponement to Jan 10.12
Tony Croston	Inn on the Prom	Emailed 16.11, 19.11, 7.1 Rang, confirmed contact and emailed 3.12 Emailed re postponement to Jan 10.12
John Kay	Clifton Park Hotel	Emailed 16.11 & 19.11 Chased 3.12- declined to participate as 'new to St Anne's' and 'recording high occupancy levels'.
Carl Baker	Bedford Hotel	Emailed 16.11 & 19.11, 7.1 Rang 3.12 spoke briefly Emailed re postponement to Jan 10.12 Rang and left msg 11.1
Mrs Webb	St Ives Hotel	Emailed 16.11 & 19.11, 7.1 Rang, confirmed contact and emailed 3.12 Emailed re postponement to Jan 10.12
Tom Webb	The Grand Hotel	Emailed 16.11, 19.11, 7.1 Rang, spoke briefly & resent 3.12 Emailed re postponement to Jan 10.12 Rang and left voicemail 11.1

Appendix B – St Anne’s Leisure and Spa Facilities

Business	Gym	Pool	Spa/Hot tub/Jacuzzi	Sauna	Steam Room	Classes	Treatments	Spa Breaks
Residential Facilities								
Dalmeny Hotel	•	• (2)	•	•	•	•	•	•
HY Hotel		•	•	•	•		•	•
Inn on the Prom	•	•	•				•	
Glendower Hotel	•							
Clifton Park Hotel	•	•	•					
Bedford Hotel	•		•					
St Ives Hotel		•					•	
The Grand Hotel	•	•	•	•				
The Sanctuary							•	
Non-Residential/Local Facilities								
Therapy House/Dawn Attewell							•	
Aesthetics Lounge 3							•	
The Salon							•	
The Tree House							•	
Clifton House							•	
Beauty								



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