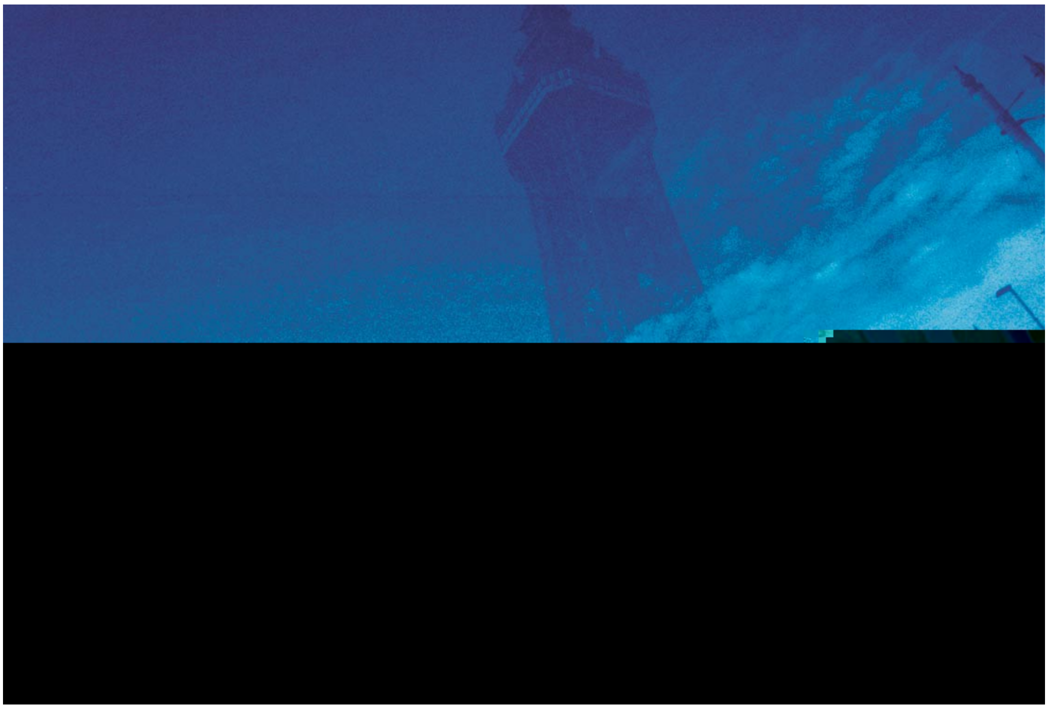
northwest development agency

A New Vision for Northwest Coastal Resorts

Summary Report



Report produced on behalf of
Northwest Development Agency
by Locum Destination Consulting

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INVESTING IN englandsnorthwest

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1. Overview

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1.1 The Project

Locum Destination Consulting was commissioned by the Northwest Development Agency to prepare a *long term* vision and strategy for Coastal Resorts in the Northwest, one that is bold and offers a clear sense of direction, but at the same time is soundly based in terms of market trends and capable of achievement.

It will act as a framework for the application of funding from the NWDA, European and other sources (such as the Lottery funds), and assist the NWDA in taking a more proactive role in shaping policy.

The following 12 resorts – listed from north to south – were included in the brief:

- Grange over Sands
- *Morecambe – focus*
- Knott End on Sea
- Fleetwood
- Cleveleys
- *Blackpool – focus*
- St Annes
- Lytham
- *Southport – focus*
- New Brighton
- Hoylake
- West Kirby

1.2 Challenging Times for Resorts

Coastal resorts all over Britain are experiencing difficult times. The massive reduction over the past thirty years in the number of long holidays taken in the UK, as people have instead chosen to go abroad, has had a devastating impact on their economic foundations. Lack of business has made it difficult to attract private investment, thus creating a quality problem, which has in turn made it even more difficult to attract business. Altogether, there is a spiral of decline that is difficult to get out of. The net effect has been severe problems of social and economic deprivation.

The Northwest's coastal resorts have been particularly badly affected. The remorseless decline is all too evident In Morecambe and Blackpool, and while less obviously visible in places like Southport and St Annes, has had a very negative impact there also.

The need for a strategy to reverse the decline of coastal resorts is recognised in the NWDA's Regional Strategy and by the local authorities concerned. On a national basis, the English Tourism Council addressed the matter in its "Sea Changes" report. At the regional level, the matter was addressed in 1993 by the Coastal Resorts Initiative.

Proposals for the funding of regeneration projects are now being submitted to the NWDA. An underlying purpose of this study is to assure the NWDA that these projects will contribute to a clear long-term vision for the resorts, individually and as a group, and that the vision is creative, yet pragmatic.

This report presents an indicative framework for the revival of the resorts in the region and vision for what they could be like in 10 to 20 years given the realities of tourism trends.

All of the proposals should be seen in that context. They are designed to provide a picture of what the resorts could be like and a framework for getting there.

1.3 The Big Picture

There are some fundamental conclusions made by the report that, Locum believes, should underpin strategy at local and regional level:

- The large volume low socio-economic market that previously sustained the resorts is no more. To prosper, they will have to widen their appeal to the middle classes, which now represent the mass market, both as residents and visitors. This requires an *entirely new level of quality and ambition.*
- Tourism is unlikely to again be the main driver of these economies (with the possible exception of Blackpool) and, in general, there is too much emphasis on it in regeneration strategies.
- All of the resorts, therefore, need regeneration strategies that encompass diversification.
- Tourism does present important opportunities, but the resorts will have to change in order to exploit them, and in most cases they are likely to be a *contributor* to prosperity rather than the main cause of it.
- The first priority should be to make the resorts nice places to live, work and play. Once they have achieved that, they will once again be attractive places to visit.
- Removing the obsolete and unsightly trappings of the old tourism, without destroying the sense of place, is perhaps the key physical regeneration challenge in this respect.
- The resorts can play an *exceptionally* important role in regional prosperity and regional Quality of Life – serious public sector intervention is, therefore, justified.
- Serious public sector intervention is also justified by the severe social problems that have been caused by the rapid decline in the resorts' traditional tourism business. This typically requires public sector investment in removing or improving deficient housing, providing better transport links, and improving the built environment.

1.4 A Co-ordinated Vision

Locum does not believe that there is or, realistically could be, an overall Northwest Coastal Resort Brand, but branding can play an important role in creating a co-ordinated vision and identity for the resorts and for the coast as a whole.

Locum suggests a four-tier framework for creating this co-ordinated vision.

- Tier 1: Themes that the coastal region could develop as a whole that could be distinctive and of the highest quality. There are some aspects of the region's tourism product where it has, or could have, abnormal strength and, because that strength is common to the whole region and there are clearly identifiable target customers, the product should be developed and promoted on a regional basis. Three suggestions for such themes are The Golf Coast, The Eco Coast and The Recreational Coast.
- Tier 2: Sub regional brands based on geographic sections of the coast where destinations that are in proximity to each other could be grouped to create, between them, a much stronger holistic destination and more cost-effective marketing.
- Tier 3: A hallmark called Classic Resorts that could be used to classify and distinguish resorts that maintain the ambience and spirit of the traditional seaside resort but in a way that appeals to modern audiences.
- Tier 4: Visions for each resort. They are expressed in the form of a short statement that is intended to give a sense of what the resort could be like in the future.

1.5 A Vision for Each Resort

Exhibit 1 summarises the "Tier 4" vision statements for the resorts – it is an indicative vision for each resort and ideas for projects requiring public sector leadership and funding that would help them to achieve that vision.

Exhibit 1 : Indicative Positioning and Possible Key Public Sector Led 'Priming' Projects

Resort	*Proposed Vision*	*Ideas for Public Sector Led Projects*
Grange over Sands	Classic Resort	Lido/Promenade upgrade High Street upgrade
Morecambe	A Beautiful Place	Central Promenade redevelopment West End Village
Fleetwood	UK Capital of Value	Town centre renewal to assist retail development
Cleveleys	Shopping by the Sea	Seafront upgrade
Blackpool	Europe's No 1 Resort	Golden Mile Convention centre Housing clearance/land assembly Resort casinos
St Annes	Classic Resort	Seafront upgrade
Southport	Style and Sophistication	Lord Street to seafront upgrade Lord Street upgrade Cultural Centre Casion/Spa
Wirral Coast	Merseyside by the Sea	
New Brighton		Poseidon Infrastructure for mixed use development Recreational infrastructure
Hoylake/West Kirby		Town centre landscaping Promenade/Marine Lake upgrade Town centre landscaping

2. Underlying Issues

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2.1 Building on Previous Work

The future of the NW Coastal Resorts was comprehensively examined by Touche Ross in 1993 as part of the Coastal Resorts Initiative. Their conclusions were hard hitting:

- The resorts had lost market share to such an extent as to threaten their viability as resorts;
- They had failed to sustain adequate and quality of product;
- The quality of their environment had fallen below customer expectations;
- They were threatened by infrastructure dilapidation and inadequate coastal defences.

Almost ten years later, despite sustained economic growth in the economy at large, the failure rate of tourism related operations has shown no sign of decline. Associated social problems have been severe.

The Touche Ross report makes instructive reading as a warning that failure to *seriously* address the issues in a *radical and focused* manner will lead to continued decline. Developments that, at the time, were seen as foundations of recovery can now be seen to have been little more than sandcastles standing against an incoming tide.

The obvious question, however, is why the problems seem little nearer resolution 10 years later given that the problems were clearly recognised. Locum believes that the probable answer is:

- It was assumed that tourism must be the answer to the problems of the resorts. In reality, it will only be part of the answer.
- The scale of the tourism difficulties was not fully comprehended by stakeholders. Marginal improvements are not enough to stabilise, let alone reverse, such a precipitous decline.

2.2 A Need and Opportunity for Leadership

One important circumstance has changed since 1993. Whereas Touche Ross struggled to identify who could lead the reinvention of the resorts, the answer to that would now appear to be more obvious: Local Strategic Partnerships at local level and the Northwest Development Agency at regional level. In addition, the North West Coastal Forum provides an opportunity to co-ordinate the work of key stakeholders working on coastal issues regionally.

Radical change will not take place without clear leadership and the need for it is as certain now as it was a decade ago. It is the intention of this report to help define the direction that the leadership should take.

2.3 Five Reasons for Substantial Public Sector Financial Intervention

Locum's assessment is that there is a case for large-scale financial intervention in the coastal resorts, and that this case rests on five legs:

- Tackling deprivation. The resorts are suffering deprivation at their core on a comparable scale to the worst hit inner suburbs of the post-industrial cities. Like those cities, they have also had their economic foundations destroyed by foreign competition. The problem is very visible in Blackpool, Morecambe and Fleetwood, but there are major socio-economic problems in seemingly prosperous looking towns like Southport and St Annes – the Dukes and Cambridges wards, for example, which cover the majority of Southport town centre, are in the top 20% of deprived wards in the country.
- Regional Economic Prosperity. With repositioning, the resorts can still play an important role in generating economic wealth for the region. They can do this directly by attracting visitors and indirectly by making the region a more attractive place to live and, therefore, invest.
- Regional Quality of Life. As they have done in the past, the resorts can provide an important recreational resource for people living in the region. They are uniquely placed in this respect.

- Regional Image. The resorts have a disproportionate effect on the image of the region. If they are perceived to be failing, the whole region will be tarnished.
- Providing Housing. They can provide desirable places to live, helping to meet Government targets for brownfield housing development and reducing pressure for green field development.

2.4 Circumstances Have Changed for Good

The dramatic technological and socio-demographic changes in the second half of the 21st century have changed forever the circumstances in which the coastal resorts are operating. Most of them – Grange, Cleveleys, Lytham St Annes, Hoylake, West Kirby, Southport and, to an extent, Fleetwood – have already adapted. They are no longer resorts in the traditional sense that very large numbers of people stay in their central business districts on holiday (although, in some cases, self-contained holiday villages on their outskirts, generally with static caravans, have been growing). Traditional tourism is no longer the foundation of their economies.

Morecambe and Blackpool have not yet adapted. Morecambe is on its deathbed as a conventional *staying* resort (apart from the caravan parks at its periphery). Blackpool is on the critically ill list and will be on its deathbed unless radical action is taken soon.

There are two primary challenges faced by these resorts.

- People are much less inclined to take long holidays in the UK. Long holidays taken in the UK have been plummeting at +10% a year for three decades, in direct inverse proportion to the increase in holidays taken abroad. As flights become ever cheaper and tastes become ever more cosmopolitan, there is no reason to suspect that this is going to change.
- The resorts have lost touch with the taste of the masses. Chips with everything no longer represents majority taste. Having experienced the delights of Orlando, Blackpool Tower and a tired two star hotel no longer fits the bill for the typical British holiday maker. The resorts are caught in a catch 22 – the erosion of their market means that it is no longer possible for operators to charge prices and achieve occupancy rates adequate to justify investment. They therefore lag further and further behind in the quality they offer compared to customer expectations. As a consequence, they are not able to exploit the growing short break and day visit markets.

2.5 Tourism Trends Have Not Been Kind to the Resorts

There have been big structural changes affecting the industry:

- Decline of UK based long holidays at the expense of foreign holidays;
- Increase in day trips;
- Increase in short breaks;
- A switch to self-catering accommodation for long breaks;
- Increase in people visiting friends and family;
- The relentless rise of the ‘middle class’ and personal disposable income;
- The increasing dominance in value terms of business tourism.

The consequences of all these changes have been very visible. Traditional working-class seaside resorts like Blackpool and Morecambe have been decimated. Destinations with a middle-class audience like the Lake District (and, to an extent, Southport) have just held their own. Cities and retail destinations have thrived.

There are always, of course, exceptions, but Exhibit 2 summarises the winners and losers from these tourism trends.

Exhibit 2 : Winners and Losers of Tourism Trends

Winners	*Losers*
Overseas destinations	Traditional seaside resorts
Cities	Visitor attractions
Near-motorway locations	Peripheral locations
Branded hotels	Mid and down market independent hotels
Self-catering	B & B's and guest houses
Branded food and beverage	
Night economy	
Self-contained holiday villages	
High quality independent hotels and F & B	
Destination retail	

2.6 Tourism Still Presents Big Opportunities for the Resorts

This is not to say that tourism is not currently important to the resorts, and will not be important in the future. It presents substantial opportunities:

- There is still a large long-stay market in the UK, one that is dominated by young families and post-family couples and is increasingly self-catering oriented.
- Short breaks have also been on the increase. They are dominated by pre-family couples and higher socio-economic groups looking for a combination of good accommodation, good food, good shopping, a good cultural experience and good nightlife.
- Business tourism has been growing substantially, both independent travel and conferences.
- Day visits are growing. In terms of quantity of visits, they exceed staying trips by a factor of 10 to 1, although spend per visit is in approximately reverse proportion. Shopping and taking light exercise in attractive locations are primary motivators.
- Post-family professional couples are, in particular, a growing market with high disposable income.
- Although tourism from overseas has had a difficult few years, it is likely to resume steady growth in the medium/long term.

The resorts could potentially do well from all these trends, but they will need to change substantially in order to do so.

It is not, however, simply a question of whether or not they should bother. The markets listed above are also those that they need to attract as investors and residents. Changing their product and their image is just as vital for non-tourism regeneration as it is for tourism development.

To be clear, Locum is not saying that tourism should be neglected. Locum is saying that it can play an *important role* in achieving a *balanced regeneration*.

2.7 Gems Needing Polishing

Several of the small resorts included in this project are highly attractive, doing comparatively well as commuter and retirement communities and, with some investment, could be gems that would be a real asset to the region.

They include Grange over Sands, Knott End on Sea, St Annes, Lytham, Hoylake and West Kirby.

Because they do not have social challenges on the scale of the larger resorts, they often find it hard to secure public funding and, as a result, are all looking a little jaded. They all, however, have potential to be top-quality recreational resources for the Northwest and important tourist attractors.

Southwold in Suffolk is an example of a small resort that, with the help of some investment, has lifted itself in this way and become a true jewel in the crown of its region.

2.8 Take Care with Over-precise Segmentation

Destinations need to understand what type of customers they are going to attract, and tourism strategies need to do that in fairly precise and detailed terms.

When considering wider regeneration strategy, however, Locum believes it is better for all stakeholders to have a general, but clear, sense of the type of people the resort is aiming at rather than a list of precise socio-demographic segments that is difficult to remember.

For most of the resorts, the challenge is to appeal to a broader range of the population i.e. to incorporate the ABC1 social groups rather than focusing only, either deliberately or unintentionally, on the C2DEs.

Niche market segments (like birdwatchers) are important and attracting them will make a difference at the margins to the economy of a substantial town like Morecambe, but need to be kept in perspective – they alone will not result in substantial economic regeneration.

2.9 The Necessity for Reinvention

As the traditional markets for the resorts have evaporated, the resorts have no option but to reinvent themselves. They need to reinvent their product and reinvent their image. People will always want to go to the seaside therefore all the resorts will continue to attract day visitors, especially on holidays and sunny days. But day visitors do not spend as much as staying visitors and their business alone is not enough to sustain an economy. Short breaks are a growing market, but not to the extent commonly imagined because the growth is dominated by young people visiting friends in cities. Business tourism is growing, but is also dominated by cities.

It would take a huge growth in day visitor and short break business to supplant the long stay business which the resorts have lost/are losing. Except possibly in Blackpool, there is little chance of this happening.

This requires a major change in perception within the resorts. In effect, they need to start thinking of themselves not as places where tourism dominates but as places where tourism plays an *important role*. In effect, as towns by the sea rather than resorts.

The resorts need reinvention to a different status – nice places to live and work and, to differing degrees, high quality day visitor, short break and conference destinations.

2.10 Too Much Emphasis on Tourism in Regeneration Strategies

Locum's observation is that the change in perspective identified above has not taken place and the resorts are placing too much emphasis on tourism as a catalyst for regeneration. Although they all recognise that times have changed and new quality standards are required, breaking free of their tourism heritage seems to be too much of an emotional wrench. Thus, there is much talk of new attractions and attracting new hotels, but little about how a more sustainable prosperity can be created. In this respect the continuing decline of the last ten years has demonstrated that they are swimming against the tide.

As the ETC's Sea Changes report states: the *"market for resort holidays is unlikely to return to its heyday. Tourism alone cannot, therefore, be a regeneration solution for all our resorts. Most will need to diversify their economy to some extent; indeed, some will be unable to compete and may need to move away from tourism altogether".*

Locum does not believe the situation to be quite so black or white as the ETC report states. Tourism has an important part to play in the economy of all the resorts, but it would be foolhardy to place all eggs in that one basket. The first priority should be to ensure that the resorts are highly attractive places to live and investment should rely primarily on the local population for sustainability. Once they are attractive places to live, the resorts will be attractive places to visit and tourism will start to make a growing contribution to their vitality.

In the meantime, finding other sources of employment and economic vitality must be given as much or more emphasis than tourism development.

2.11 Removal of 'Bucket and Spade' Trappings a Prerequisite

Nationally, the resorts that have had most success in regenerating are those which have cleared away the obsolete remnants of their resort days – the chip shops, down market B&Bs, cheap souvenir shops etc – so as to ensure their appeal to a broader audience. The changes are illustrated by the following examples:

- Brighton has banished the traditional resort trappings to the Pier, smartened up the Esplanade and filled it with trendy bars, clubs and restaurants and BandBs have been converted to houses. It stages a major arts festival, and has extensive characterful shopping areas. It no longer feels like a resort it feels like a pleasant place to live for people who like a combination of urban vitality and living by the sea. Many people are happy, therefore, to live there and commute to London, over a hour's train journey away. Tourism is playing an important role in Brighton, but it is a city by the sea now as opposed to a pure resort.
- Bournemouth has retained more focus on the resort element, but has carefully broadened to a more sustainable offer by concentrating on conference tourism and upgrading its image. Like Brighton, it has developed a fairly broad economic base and feels like a town by the sea rather than a tourist mecca. It is a popular place to live and work.
- Southsea is rapidly losing the unattractive remnants of its resort days while enhancing the attractive parts, such as its seafront gardens and promenade. It has become a desirable suburb of Portsmouth.
- St Ives made perhaps the most concerted effort to leap out of the old world by attracting the Tate, which has brought a different type of visitor and gradually changed the type of business that operates in the town.
- Margate is following that lead by building a stunning modern art museum as the focus of a cultural quarter.
- Southwold has constructed a new pier, but it is one that matches the taste of the new era – instead of a funfair and amusement arcades, it has a clever sculptural clock, an exhibition about seaside resorts, and pleasant selection of eateries. The town is pristine and full of interesting shops, coffee-houses and galleries.

2.12 More Focus Needed on the Building-line Side of the Promenade

Due to the investment that has been and is being made in Sea Defences, environmental improvements in the coastal resorts have been dominated by improvements to the seafront promenades. This has produced excellent results, Morecambe's TERN project being perhaps the best example.

Little attention, however, has been given to the landward side of the Promenade, i.e. the space immediately in front of the building line. It is here, in reality, that attention is most needed as it is here that private sector investment needs to be stimulated.

The resorts are classic cases of the devastation that allowing the car to dominate can bring. We suggest that all three of the main resorts – Morecambe, Blackpool and Southport (in this case, Lord Street is not on the seafront but the same principles apply) – apply radical surgery to remove or reduce traffic from what should be their most important public spaces. These thoroughfares are the most important and dominant public spaces in each town. They are spaces ideal for promenading and cycling, spaces where restaurants and bars could thrive, spaces where people would like to live if it wasn't for traffic noise and fumes.

This is important not just from an aesthetic point of view, it is critical to increasing property values which in turn is critical in creating a beneficial investment cycle. The pedestrian esplanades in both Morecambe and Blackpool are built on the beach side of the road, an obvious choice for giving pedestrians sea views, but a poor choice for ensuring the vitality of seafront businesses. They need passing footfall, and pavement space to spill out onto.

2.13 Access Needs to be Improved

By their nature, coastal resorts tend to be geographically peripheral which makes it difficult for them to develop a balanced economy. Morecambe, Southport and Fleetwood in particular suffer from severe road access difficulties that makes their regeneration more difficult.

Morecambe's prospects will be instantly enhanced by the construction of the planned direct link to the M6. It will become easily accessible for commuters, visitors and businesses. From the point of view of economic regeneration, the road is a priority.

Schemes that would improve the access situation for Southport and Fleetwood seem to be further from realisation, but both towns need it.

Although Blackpool has the advantage of a motorway link, its recovery will depend not just on transforming the product but on making it easy and efficient to get there. It will be relying on customers coming for short periods and it also needs be a more attractive location for commuters to live. The airport is likely to eventually be important in this respect – if Blackpool is to realise its vision of being a resort for the 21st century, it will almost certainly have to offer a network of incoming short haul flights to other parts of the UK and Europe. As in Las Vegas, the proximity of the airport to the town centre could eventually be a major plus for the resort.

2.14 New Quality Benchmarks Needed

No tourism resort can prosper without catering to middle class taste – in other words, the taste of the mainstream. The resorts have failed to realise how far they have become detached from mainstream taste. This is a common scenario where long established industries face new competition – similar, in fact, to how traditional manufacturing industry in the Northwest was decimated in the 1970s and 1980s by Far East competitors offering new quality standards at competitive prices. In these situations, it is difficult for locals to realise that there is a problem, and even more difficult to do something about it.

Mainstream taste in 2002 is illustrated by the people who flock to the Trafford Centre to shop at Selfridges, who look forward to taking the kids for a week to the Disney Resort in Orlando, and who eat at Pizza Express. Locum has met many stakeholders in the resorts who are committed to improved quality, but they do not seem to realise quite what that means. It is hard to overstate the size of the gap. To ensure future prosperity, a totally new level of quality is needed.

2.15 The Downsizing Challenge

It is sad but inescapable that many tourism related businesses in the resorts are not going to survive. Marginal operations have been going out of business at a rapid rate and that is almost certain to continue.

More controversially, there is a strategic need to encourage such businesses to cease operating. In some cases this is because their operations are out of keeping with the new quality standards that the resorts must aspire to. In others this is because their presence retards what could otherwise be pleasant residential areas.

There are a number of difficult challenges, principally:

- How to give the owners a satisfactory exit route;
- How to prevent conversion of property to less satisfactory uses, such as houses in multiple occupation;
- How to manage the "pruning".

In some cases, the strength of the housing market ensures that the market will do what is necessary of its own accord. In others, especially in central Morecambe and Blackpool, it is not strong enough to do that and more radical action is needed.

2.16 The Problem of Too Many Houses in Multiple Occupation

A problem common to the resort towns, and most serious in Morecambe and Blackpool (but also very evident in the others such as Southport, Fleetwood and St Annes), is that of former hotels and guest houses that are now being used as multiple occupancy residential. This attracts a transient low-income population and creates blight. It is a primary reason why the central areas of Blackpool and Morecambe are not desirable places to live or visit.

It is almost certain that many more guesthouses and small hotels are going to fail in the next decade, exacerbating the problem. Blackpool's SRB6 programme includes a trial of an urban village scheme to manage this process and promised in its application that this would be a model for the region. Morecambe's brief for the masterplanning exercise it has commissioned emphasises the same issue.

This issue is allied to that discussed in Section 2.18 and also ideally requires a regional (or, indeed, preferably a national) strategy. Dealing with the problem will require significant resources via the Government Office for the North West to fund clearance/CPO's etc. Agencies other than NWDA also need to tackle these issues and make available necessary resources.

2.17 Stimulating Town Centre Property Prices

A reason that guest houses and small hotels get converted into HMOs is that property prices are not high enough to justify renovation and conversion into homes. This is because the town centres are not desirable places to live.

There is no obvious reason, however, that they should not be desirable places to live. Urban living has come back into vogue in the UK and people always like living by the sea. In sharp contrast to the situation at the centre of Morecambe, for example, house prices are strong in its suburbs. Coastal resorts in other parts of the country (Brighton, Southsea, Felixstowe are just some examples) have strong residential demand in their seafront neighbourhoods.

It is perhaps currently hard to imagine affluent people wanting to live in the centre of Morecambe and Blackpool, but it would have been hard to imagine 10 years ago that they might want to live in the centre of Liverpool, or in the Hamilton Quarter of Birkenhead. The added advantage that the resorts have in this respect is that they are attractive to the retired.

The obvious place to establish a new benchmark for property desirability and price is the seafront. This is one of the reasons why Locum strongly advocates environmental improvement and traffic calming on the landward side of the esplanades in Blackpool and Morecambe – it should be done with a clear view to encouraging private sector development on sites overlooking the sea.

This will create a positive cycle that will start attracting people into the area and pushing up prices on the backstreets. Blackpool and Morecambe appear to have an excess of property in poor condition, and substantial clearance may be the only answer (although care needs to be taken not to destroy the sense of place). Obviously, attracting residents to the town centres will require quality housing.

2.18 Successful destinations cannot be successful next to social deprivation

The ready availability of low price accommodation (in conjunction with the attractiveness of DSS payments to landlords who would otherwise have little income), and the perceived availability of low skilled jobs, attract people with difficulties to the resorts. In effect, they have become collecting places for people with problems.

Unfortunately, this in itself hastens the economic decline of the resorts. They depend on being attractive and friendly places to visit (and live). The presence of extreme social deprivation creates exactly the opposite effect.

A key part of the regeneration programme must, therefore, tackle the deprivation and eliminate the magnet effect that the resorts have. This is perhaps the greatest challenge they face.

2.19 Take Care with 'Sticky Plaster' Solutions

As is often the case in these situations, development of new visitor attractions is seen as the answer. Sometimes indeed they can be – Cornwall's Eden Project being a case in point. More often than not, however, the results are below expectations and attractions are difficult to sustain financially. Eden is, to an extent, the exception that proves the rule.

Visitor attractions are an important component of destinations, but by no means the only component or, necessarily, the most important. An outstanding retail or night offer, for example, would typically attract many more visitors than a museum. Fleetwood's Freeport proves how successful a retail destination can be as an attractor. Places like Bath and Chester are major tourist destinations not for their formal visitor attractions but because of their superb environment and ambience.

Any new attractions should be entirely in tune with the image that the resort is trying to develop. The Tate in St Ives achieves that and, therefore, makes a positive contribution both directly as an attractor and in defining the character of the destination brand.

Locum thinks it unlikely that development of new visitor attractions is the answer in itself for any of the resorts, although in some cases they could make a useful contribution. On the whole, investment is better directed at environmental improvement and creating conditions that will stimulate private sector investment.

2.20 Everyone Wants to Create 'Icons' – Few Succeed

Iconic attractions like Eden and Guggenheim Bilbao are rare examples of genius and inspiration. For every one that succeeds, many fail. The line between success and failure is narrow – for example, Barcelona's attempt to match the Bilbao Guggenheim's success with a modern art gallery designed by another leading American architect, Richard Meier, has been a comparative failure.

Locum has come across one idea, which seems to have the spark of inspiration that could make it iconic and a major attractor to the region – a 180ft statue of Poseidon, God of the Sea, in the Mersey at New Brighton[1]. It could provide a powerful symbol of the region's renaissance and a unique and accessible attraction.

2.21 Inappropriate Uses for Key Sites Should be Avoided

Another pitfall is allowing key sites to be developed for uses that seem to offer a way forward but, in fact, degrade the sense of place.

Some of the resorts, for example, have allowed supermarket developments on prominent seafront sites, instantly spoiling their sense of place (even when more attention than normal has been devoted to the architecture of the store). Buildings constructed in the past 30 years have nearly all been of mediocre quality and have, in the end, probably done more harm to resorts than good by diminishing the sense of place.

All the resorts should follow the lead of Grange and St Annes in preparing a design strategy.

2.22 Respect for Heritage is Key to Future Regeneration

The heritage of a resort may not be as old as that of a cathedral city, but can be just as interesting. Furthermore, the resorts have had their glory years in the era of film, so there is wonderfully evocative archive material available.

The greatest possible effort should be made to preserve the built heritage where it is of quality. It is very easy to lose it in times of desperation and once lost, it can never be regained or replicated. This can apply as much to Victorian terraces as it does to old theatres – the resorts must be careful not to mortgage their future by losing their sense of place during difficult times.

The resorts should also show off their heritage more boldly. Locum hesitates to recommend the creation of visitor attractions to do so because they are not likely to be sustainable. It would be better instead to make that heritage as accessible as possible – through, for example, exhibitions attached to the Tourist Information Centres and interpretation panels.

2.23 A National Seaside Museum?

Because of the deep affection for the seaside, a National Seaside Museum would represent a possible idea for one of the principal resorts. There is so much evocative archive material available – especially film – that it could be a strong attraction both in terms of quality and public appeal.

2.24 Bathing versus Birds

It is beyond the remit of this report to consider environmental issues relating to the coast as a whole and the complex issue of water quality, but it is self-evident that continual improvement of the water quality for the purpose of bathing, and of the cleanliness of beaches used by visitors, is important to the future of the coast. There may be a conflict between this and encouraging birdlife. The idea of zoning so as to reduce this conflict has been suggested and seems to be logical.

1 Explained in Section 11.1.3

2.25 Working within the Regional Spatial Planning Framework

Regional Planning Guidance (RPG), incorporating the Regional Transport Strategy, is the regional spatial strategy within which local authority development plans and local transport plans should be prepared. Draft RPG for the North West is built around seven key objectives, including, of particular significance to the Coastal Resorts, “to ensure the sensitive and integrated development and management of the coastal zone, and secure the revival of coastal resort towns”.

Draft RPG includes policies which set out the framework for coastal settlements. These policies encourage development and restructuring where it will help diversify local economies and promote regeneration of coastal communities, by developing tourism roles which reflect local heritage and character and protect and enhance existing tourism attractions, by promoting regeneration based on the region’s maritime heritage and by addressing issues of environmental decline and social and economic exclusion.

3. A Framework

3. A Framework

3.1 A Four-Tier Framework for the Renewal of the Coastal Resorts

Locum believes that it is important to think about how the resorts can be developed and promoted in harmony, and has advanced a framework for achieving this. There are four dimensions to this framework:

- *Themes* to be developed and promoted where the coastal region as a whole has advantage compared to other areas.
- Destination brands based on *geographic sections* of the coast where there would be advantages in linking resorts and other attractions together.
- Hallmarks based on the *character* that each resort will have in future.
- Visions for each of the individual resorts.

3.2 Tier 1: Regional Themes

There are some general themes that apply to the Northwest Coast as a whole, where it has, or could have, a distinct competitive edge. They could, and probably should, be actively developed and marketed on a regional basis.

The advantage of doing this on a regional rather than local basis is that it is more cost effective to identify likely customers and offer them a product that has substance. As a simple example, a regional golf product aimed at Americans is likely to be more attractive to them than a local golf product, and it is more cost effective to identify the most likely customers and promote to them as a region, rather than individually. In effect, it allows the cost-effective use of *relationship marketing*.

To be clear, these are niche markets – Locum is not suggesting that exploiting them will of itself transform the prospects for the resorts.

3.2.1 The Golf Coast

The links courses along the coast include exceptionally famous names like Royal Birkdale, Royal Lytham St Annes and (to a lesser extent now, but to be restored when the Open returns to it in 2006) Royal Liverpool. Unquestionably, this is the primary golfing region of England and its brands are known world-wide.

The golf tourism market is a small but valuable niche. About 500,000 golf holidays (i.e. where golf is the main purpose) are taken in the UK each year, and there are about 1.1 million trips where golf is played on the holiday[2].

Golf holidays overwhelmingly feature hotel accommodation, which makes them high value.

A difficulty in exploiting the fame of the top courses is that they are so popular that getting tee times is difficult. Furthermore, with no shortage of custom, the courses feel no particular need to co-operate in tourism development. Southport came up against this problem when it appointed a golf marketing officer in 1999.

Nevertheless, there are many subsidiary courses with capacity and it is worth developing the product because golf tourism is high value.

Although Sefton BC, Wirral BC and Liverpool City Council are co-operating in promoting Merseyside as the English Capital of Golf, there appears to be little regional co-ordination. Every district with a famous golf coast seems to promote itself as “The Capital of English Golf” or “the Golf Coast”.

It would possibly be better if there was a co-ordinated regional approach to the development and

2 UK Travel Survey

promotion of the golf product. People like to play several courses on a golf holiday (the average for overseas golf tourists is 3.25 courses per trip). A passport scheme incorporating 10 courses in the Scottish Borders area (not a noted golf destination) sells around 3,000 a year[3].

"The Golf Coast" is a strong potential niche brand for the region – Locum believes it would be better to deploy it to cover all the famous links courses rather than just one section of the region's coast.

3.2.2 The Eco Coast

The Coast is lined from north to south with sites of special environmental importance and, in particular, world-class birdwatching opportunities. Again, every section of the coast boasts its particular strength in this respect, and it would seem logical to develop and promote this in tandem.

As with the golf niche, there is a sizeable group of people who are potential customers. The Royal Society for the Protection of Birds has over 1 million members in the UK, with 90% renewing their membership each year. It has begun to market its own birdwatching holidays both in the UK and abroad. The North Norfolk Coast is one such destination.

In 1999 the RSPB conducted an assessment of the economic benefits that an attractive coastline (in terms of wildlife) brings to the local economy. Visitors to six sites on the Norfolk coast were estimated to spend £21 million in the local area per annum, supporting 135 FTE jobs.

Birdwatching is not, of course, the only activity that could be covered under the Eco Coast banner. It offers substantial opportunity for a creative linking of eco-products and themes. Both Southport and Morecambe, for example, are already advancing Eco Centre projects and it would seem to make sense to tie them into a regional product.

3.2.3 The Recreational Coast (Cycling, Walking, Riding and Watersports)

The coast has enormous value as a recreational resource to people who live in the region, and potential visitors.

The coastal defence works have provided the opportunity to create level, traffic-free cycling conditions for long stretches up the coast. In some cases, such as Morecambe and West Kirby, there is the added advantage of a superb scenic background.

This is a great opportunity for recreational cycling, and it could be exploited further through, for example, making it easy to hire cycles and providing one-way drop off. This is an area where an ambitious approach, modelled perhaps on initiatives in Holland and Denmark, could develop a product of unique quality.

There are also outstanding facilities for watersports, especially on the marine lakes that many of the resorts feature.

The proposed North West Coastal Trail would link resorts and areas of nature conservation, cultural and heritage interest, adding to the strength of the product.

3.3 Tier 2: Regional Brands Based on Geography

3.3.1 Logical Divisions

The study area divides into four geographic divisions, separated by estuaries:

- Morecambe Bay
- The Fylde Coast (i.e. Fleetwood to Lytham)

3 S Beioley, Insights Jan 2002

- The Sefton Coast
- The Wirral Coast

These divisions cut across local authority boundaries and, in the case of Morecambe Bay, across tourism regions. However, these sub-regions have a coherence and logic from a consumer point of view.

3.3.2 Additional Coastal Brands

The matter is further complicated by the proposed Mersey Waterfront Regional Park, incorporating both Southport and the Wirral Coast. Locum is of the opinion that Southport and the Wirral Coast beyond New Brighton do not naturally fall within the "Mersey" brand from a customer perspective. To the north, the Cumbria coast also has distinctive characteristics.

3.3.3 A Branding Opportunity

There would be much to be said for structuring tourism development around the divisions above and giving some or all of them brands, in a similar style to the way that the Spanish Mediterranean (Costa Brava, Costa del Sol, etc.) and Queensland Coasts (Gold Coast, Sunshine Coast, etc.) have been subdivided and branded.

It would require a major branding exercise – Locum has not endeavoured to suggest what the brands might be called and recognises that it would not be easy. Attempts have been made in the past without them sticking.

Rebranding of this nature only makes a difference and is only sustainable if it is done thoroughly and with commitment – on gateway signs, TiCs, maps, brochures, public transport, etc. It is probably only achievable with a radical restructuring of tourism organisation so that the organisational structure of tourism development and marketing matches up with the brands (perhaps with brand managers for each local area to ensure enough focus on local issues).

Work is already taking place on these lines – for example, by the Morecambe Bay Partnership.

3.3.4 The Fylde Coast Offers a Particularly Strong Opportunity

The biggest opportunity, yet most difficult branding challenge, is the Fylde Coast. The resorts on that coast complement each other and will, hopefully, do so even more in the future.

They have a reasonable public transport link now, and that is to be improved with the upgrade of the tram and extension to Lytham. It will be possible for visitors to easily travel between Fleetwood and Lytham.

There is already strong interlinkage between the resorts. Many people choose, for example, to stay in Cleveleys rather than Blackpool because it is quieter but they still have easy access to Blackpool's attractions.

The vision that Locum suggests for each of the resorts on the Fylde Coast is intended to further differentiate them and create product offers that will harmonise. Each will offer a product of high quality, but will be quite different.

In those circumstances, there is a strong argument that integrated branding and marketing would be in the interest of all of them and would be much more effective in attracting visitors.

3.3.5 Not Confined to the Coast

These brands need not be thought of simply in terms of coastal communities. Most tourists have cars and will not confine themselves to the coast. The Morecambe Bay brand could, for example, include Lancaster, the Lune Valley, the beautiful monastic village of Cartmel, and Ulverston.

3.3.6 A Regional Framework

Even if the sub-regional branding is not carried through to the public domain, it can play a role in helping to ensure that each of the resorts is regenerating in a manner that is complementary to the others – both on a regional and sub-regional basis – and to guide the public sector accordingly.

3.4 Tier 3: The Classic Resorts Hallmark

A number of the resorts have the potential to be a strong component of the Northwest's tourism product, not typically as places where people go to stay for long holidays, but as short break and day visitor destinations. They could be given the designation 'Classic Resorts', and actively marketed as such.

In marketing terms, this would be a hallmark similar in concept to the Blue Flag scheme. Consumers would know that they could expect certain standards from a resort with the 'Classic' designation.

Candidates for this designation are:

- Grange over Sands
- Morecambe
- Fleetwood
- St Annes
- Southport
- Hoylake
- West Kirby

The concept is described in more detail in Section 3.5.

3.5 Tier 4: Visions for Individual Resorts

The primary purpose of this report is to attempt to define a vision for what the resorts could be like in 10-20 years.

Ideally, a sense of the vision should be encapsulated in a short and memorable phase, preferably one that can become part of the marketing and which will become part of local lore. This helps to keep it in the forefront of the minds of all stakeholders.

It is easier said than done to come up with such phases. Exhibit 3 shows Locum's suggestions.

The rationale is explained in the sections devoted to each resort. The intention has been to attempt to create a vision that creates a clear niche for each resort.

Exhibit 3: Brands for Individual Resorts

Grange over Sands	Classic Resort
Morecambe	A Beautiful Place
Fleetwood	UK Capital of Value
Cleveleys	Shopping by the Sea
Blackpool	Europe’s No 1 Resort
St Annes	Classic Resort
Southport	Style and Sophistication
Wirral Coast	Merseyside by the Sea

Because Grange and St Annes are comparatively small resorts, we have suggested they use Classic Resort as their brand. They could, however, develop an individualised brand statement. Because Classic Resort is intended to be a hallmark, a resort could have that designation in addition to their individual brand statement.

4. Classic Resorts

4. Classic Resorts

4.1 A Hallmark

Classic Resorts is intended to be a hallmark that resorts will be able to use in marketing themselves, and that the Northwest can use in marketing itself. It is intended to appeal to high-value visitors, including visitors from overseas.

4.2 Providing a Clear Vision and Target for Stakeholders

Marketing to tourists is not, however, the main reason for advancing the idea. The main purpose is to give a clear focus to all stakeholders involved in the regeneration of the resorts.

The aim is to achieve an effect similar to that when cities apply to become European Capital of Culture: it galvanises everyone and they know where they are heading. Each city tackles the challenge in a different way, but they know that they have to achieve certain standards in order to succeed.

4.3 Not an Identikit

Locum is not suggesting that all the resorts should be identical to each other, no more than all Blue Flag beaches are identical to each other. They should all, however, offer certain qualities that will be of value and importance to the visitors they aim to attract. By doing so, they will also be desirable places to live and invest.

4.4 Preserving the Spirit of the Traditional Seaside Holiday

A key element of their offer should be preserving a sense of what the traditional seaside holiday was like. Memories and nostalgia for seaside are deeply embedded in the psyche of the British and an objective of the Classic Resorts concept is to make connections to that. The 1993 Coastal Resorts Initiative identified the following “core components” of the British seaside resort:

- A promenade, a beach and views of the sea;
- Traditional attractions including fun fairs and parks;
- A range of hotels and guest houses;
- Wet weather and sheltered areas for entertaining and relaxing;
- Leisure swimming areas, preferably including open air bathing.

The challenge is to adapt these core components to the tastes of a modern audience.

4.5 Possibilities for National and European Participation

The idea could also provide a framework for partnership and benchmarking with other resorts in Britain and Europe that have similar challenges to those in the Northwest. As such, it could be a strong candidate for funding from trans-national European programmes.

4.6 A Target

A possible approach would be for the resort Local Strategic Partnerships, in conjunction with the NWDA and the Regional Tourist Boards, to set a target date for implementation of the Classic Resorts brand, then set in place programmes covering each of the six criteria.

4.7 First Priority is Quality of Life

For all of the resorts nominated, Locum believes that tourism can be an important part of their economy, and they can make a contribution to the health of the regional economy, but that tourism should only be seen as one part of the mix. Above all, they must position themselves as excellent places to live and work.

Achieving that objective will go hand in hand with becoming a classic resort. The values proposed for the classic resorts are more to do with quality of life than overt tourist attractions.

4.8 The Brand Values

Classic Resorts are envisaged as being attractive for their sense of quiet sophistication and their preservation, in a modern way, of the spirit of the traditional seaside resort.

The individual values that will contribute to the brand values are:

- Heritage – exemplary respect for architectural and environmental heritage;
- Pristine Built and Natural Environment – the sense of entering a "jewel", certainly at the heart of the resort;
- Quality Shopping – a strong, distinctive independent retail sector;
- Quality Hotels – a selection of hotels in prime locations offering outstanding quality as indicated by entries in publications such as the Good Hotel Guide.
- Quality Food and Beverage – a selection of pubs, coffee shops and restaurants which offer outstanding quality, as indicated by entries in publications such as the Good Food Guide.
- Culture – a consistent programme of cultural activity.

This may be at odds with what many people will interpret as the values of a traditional seaside resort: cheap and cheerful bucket and spade. The resorts that are suggested for this branding are those that Locum believes can make the transition to being thought of in a different way and can, thereby, attract new markets.

4.9 A Model

Southwold in Suffolk is a good model. It preserves its sense of place as a seaside resort beautifully – for example, the beach huts are freshly painted, the beachfront gardens are immaculate, it has built a new pier. It has, however, lost the less attractive trappings of declining resorts – cheap funfairs, amusement arcades, shops selling cheap novelties, down-market BandBs. Instead, it has good quality specialist shops, art galleries, tearooms and coffee shops, pubs and restaurants, and a vibrant community-led cultural programme. It succeeds both as a place to live and a place to visit.

4.10 Consistent Application of the Brand Values is Essential

As with any successful brand, the promises the Classic Resorts brand makes must be delivered every time the consumer experiences it. A resort should only, therefore, be given the Classic Resort designation once it has reached the standards that are expected of the brand.

To use an analogy from the hotel industry, before a property can be designated as a Marriott, it must comply with Marriott standards. This is because the success of the Marriott brand depends entirely upon customers being able to depend on certain standards each time they choose to stay in a Marriott hotel. Trust is the foundation of brands, and, if this brand is to work, consumers must trust it.

4.11 Achieving the Brand Values

None of the resorts currently entirely complies with the values that Locum has in mind. With investment and a clear focus, however, they could all be brought up to an acceptable standard (which could perhaps be a rating of at least Good on all variables and Excellent on at least two).

4.12 No Compromises on Quality

The aspirations for quality must be very much higher than they are currently, especially in the accommodation, food and beverage and retail offers.

The offer in the Classic Resorts is likely to remain dominated by the independent sector but it should be an independent sector aspiring to get recognition in independent arbiters of quality such as the Good Food, Good Hotel and Good Pub Guides.

5. Grange over Sands

5. Grange over Sands

5.1 SWOT Analysis

Strengths	*Weaknesses*
● Victorian/Edwardian character. ● Gardens and parks. ● Superb views over Morecambe Bay. ● Proximity to Lake District. ● Interesting shops. ● Strong commuter base. ● Relatively prosperous community. ● Strong community spirit. ● Good hotels, with conference facilities.	● Restricted access to public sector funds. ● Traffic dominance. ● Dereliction of Lido site and bridges over the railway.

Opportunities	*Threats*
● Lido and promenade redevelopment. ● Quality shops, cafes, galleries etc. ● Traffic calming to create better ambience and trading conditions. ● Exploit the scenic Lancaster-Barrow railway link.	● Competition destroys independent retail sector.

5.2 An Exceptionally Pleasant Place

Grange over Sands is a delightful example of a genteel Victorian resort. As a result, it is popular with commuters from Lancaster and Kendal, and as a place to retire. It also retains a significant tourism base and has substantial hotels, which have enjoyed considerable investment. It is building near the promenade a new swimming pool in what appears to be a refreshingly attractive and high quality (modern) style.

5.3 Investment Would Produce Excellent Results

Grange is a good example of a community that, because it is comparatively prosperous, has not had the same access to public funds as more deprived areas. In consequence, it is looking jaded.

The raw material is, however, excellent and investment – perhaps of the order of a few million pounds – would ensure its future as a significant tourism and recreational asset for the region.

5.4 The Vision: A Classic Resort

Grange is already a long way down the road to achieving the attributes that Locum has in mind for a Classic Resort. The expression seems to encapsulate the Grange offer: even if the region does not develop Classic Resorts as a hallmark, it could be a good vision statement and advertising slogan for Grange.

To fully achieve the status that Locum has in mind, the type of improvement that Grange would need is:

- Upgrading the Promenade, including the derelict Lido site.
- Upgrading of the quality of the high street experience with less traffic, better paving and street furniture, and pristine maintenance of shop fronts;

- More high quality independent shops, galleries etc;
- More high quality pubs, coffee shops and restaurants.

Overall, a high quality retail and catering offer, in conjunction with the opportunity for pleasant and interesting walks, are the ingredients most likely to attract people to Grange.

5.5 Upgrading the Promenade

The derelict Lido, promenade, bridges over the railway and approaches need investment. Consultants have been appointed to identify potential approaches. The Morecambe Bay Interpretation and Marketing Strategy recommends an attraction that "should be planned so that it requires as little maintenance and revenue expenditure as possible", which seems to be entirely sensible. The work is likely to require a fairly substantial public sector investment and Grange has the disadvantage of having limited access to such funding.

It is with a degree of regret that Locum endorses the demolition of the Lido. It appears to be the sole remnant in the region of the seafront lidos that were, at one time, the focal point of nearly all the resorts and which are still fondly remembered by many people. Putting aside issues of financial sustainability and practicality, it would be very nice if the Grange Lido could be preserved as a memory of those days.

5.6 The High Street

The High Street is charming and could be a real asset, but is dominated by through traffic and is looking jaded. Traffic calming and improvement of the public realm would be a good investment from a regional perspective and would help to attract the type of retail and catering operation that will take Grange up a notch.

6. Morecambe

6. Morecambe

6.1 SWOT Analysis

Strengths	*Weaknesses*
● Beautiful outlook over Morecambe Bay. ● High quality Promenade. ● Proximity to booming Lancaster. ● Popular events programme. ● Outskirts are desirable places to live.	● Poor quality product. ● Few attractions. ● Loss of key parts of heritage. ● Severe deprivation in central areas. ● Poor housing quality. ● Many HMOs. ● Poor quality modern buildings. ● Prominent gap sites.

Opportunities	*Threats*
● Designer Outlet development on the key Frontierland site. ● Restoration of the Midland Hotel. ● Art Deco heritage in the vicinity of the Midland Hotel. ● Potential to convert Marine Drive into outstanding public space. ● “Urban Village” atmosphere of the West End. ● Potential use of the Victoria Pavilion as an attractor. ● Magnificently evocative heritage. ● M6 road link. ● Improved commuter rail service.	● Further downward spiral. ● Resources are wasted on trying to recover a family holiday market.

6.2 A Difficult Challenge

Morecambe is probably the most challenging of the resorts in terms of formulating a vision.

It is on its last legs as a resort in the traditional sense of the word – a place where people go for holidays – except for self-contained caravan oriented holiday villages on the outskirts, which provide the main tourist accommodation. The remaining serviced accommodation is primarily catering for coach groups using the town as a cheap touring base, and business tourism (especially contractors working at the Heysham Power Station and on construction projects).

Morecambe is unlikely to regain its position as a major destination for people taking holidays, long or short. To do so would require a massive Eden Project-style iconic attractor, and it is not obvious what that could be or how it could be sustained.

Although the views of the Bay are attractive, it will never fully compete with the nearby National Parks for holiday trade and it is too peripheral to establish a major conference trade.

Morecambe does, however, potentially have a profitable future as a place to live and work, and as a day visitor destination. That future, however, has no commonality with the tired destination product currently on offer. It requires complete transformation.

Dealing with the challenges faced by Morecambe, especially housing and deprivation, requires a very large amount of public funding from a variety of government departments.

The regeneration of Morecambe will be difficult while the central area is blighted by low-quality housing, too many houses in multiple occupation, and social deprivation. The public sector needs to take the lead, through the use of compulsory purchase orders and other means, in tackling the problem.

It requires substantial restructuring of HMOs, clearance of substandard housing and land assembly for redevelopment (albeit that care is needed not to destroy the sense of place and the "village" feel of the West End).

More resources are required, especially from GONW. Morecambe suffers from the disadvantage of being the only one of the three major resorts lacking access to significant mainstream regeneration funding, particularly ERDF.

Unlike, perhaps, the situation with other deprived inner city areas in the region, however, there will at least be a substantial payoff for investment in terms of regional Quality of Life. There is no reason why Morecambe should not be an outstanding place to live, work and visit.

6.3 The Need for a Balanced Regeneration Strategy

Lancaster District's regeneration strategy for Morecambe is dominated by tourism. It is not balanced. Tourism should be seen as a contributor to prosperity not the sole source of prosperity.

To put matters into perspective, the North West Tourist Board estimates that staying tourism contributes £65 million to the economy[4] of the entire Lancaster District (figures are not disaggregated for Morecambe). That would support about 2,000 jobs, which is important but not the lifeblood of the economy. Furthermore, much of the expenditure is by business tourists and people visiting friends and relatives. Estimated expenditure by day visitors is higher, but much of that is shopping and, again, by people visiting friends and relatives.

Morecambe needs to create non-tourism dominated employment opportunities and, probably most importantly, needs to attract residents who work elsewhere to live in its central areas.

6.4 The Foundations of the Transformation

The following are ingredients that Locum suggests could form the foundation of the transformation of Morecambe:

- Improved road access from the M6, preferably by the "western route";
- Exploiting the proximity to Lancaster, a thriving centre of commerce and education;
- Improving the attractiveness of the seafront and, in particular, reducing the dominance of Marine Drive;
- Exploiting the key legacy buildings from Morecambe's glory days;
- Exploiting the attractive urban grain of the West End.

6.5 The Urgent Need for Improved Access

The difficulty of getting to Morecambe is the main obstacle to diversification and regeneration, and also to developing a more solid day visitor business. The proposed M6 link is a priority. It will immediately:

- enhance the development potential of sites around Morecambe, creating employment and stimulating demand for accommodation in the town;
- make Morecambe a more attractive place to live for commuters working in towns and cities like Lancaster, Kendal and Preston;
- make Morecambe a more desirable destination for a day trip.

4 A Strategy for Tourism in Lancaster District, 201-2006

The western route appears to be the best option from a regeneration perspective, not least because it would facilitate commuting to the University.

For similar reasons, enhancing public transport, especially between Lancaster and Morecambe, is another priority.

The issue is simply this: what could be done to make it easier for people to work and study in Lancaster and live in Morecambe?

6.6 The Lancaster Opportunity

Lancaster's population is the fastest growing of any district in Lancashire, and many homes will have to be built over the next ten years to cope with the expected influx.

This housing shortage also applies to the University. It intends to apply for planning permission for 1,750 bed units on an extension to the south west of the campus. Many university students used to live in Morecambe, and their return to the town would help re-establish vitality. Construction of the Western Bypass would make this viable from a transportation perspective.

The housing shortage is causing considerable pressure for green field development, development that runs contrary to government policy and is vigorously opposed by a strong environmental lobby in the district.

There is lots of opportunity for attractive, high-density residential development in Morecambe. Making it a desirable place to live would create a larger, more prosperous residential population that would provide the bread and butter trade to sustain the local businesses that will be the foundation of Morecambe's future as a day visitor and short break destination.

It is also, ultimately, the best way to solve the problem of houses in multiple occupation and poor quality housing stock. If demand for housing is stimulated, prices rise, which makes refurbishment viable.

Locum suggests, therefore, that intervention be made with improving the desirability of central Morecambe as a place to live as the main focus. This may require substantial clearance and use of compulsory purchase orders.

6.7 A Viable Destination

Morecambe does have a future as a destination. Indeed, its success in doing so will be a key factor in determining whether it also becomes a desirable place to live.

This future is, however, very much as a day visitor destination, certainly in the short term. Once it has recovered vitality and the built environment is attractive, it may also recover as a substantial leisure and business resort.

The investment by Morrisons in a designer outlet village on the Frontierland site is likely to be a good start in developing a day visitor base, although there are concerns that it may be targeted at a down-market audience, which would not be helpful to Morecambe (which must get out of the C2DE cul de sac if it is to prosper). In conjunction with the restoration of the Midland Hotel, the designer outlet centre could create a beacon of quality at the heart of the town.

6.8 The Vision: A Beautiful Place

The main advantage that Morecambe has is the natural beauty of its location. Locum's suggestion is that it adopts "A Beautiful Place" (or a variant) as its slogan and vision. It could appear on marketing material, gateway signs, Council publications etc.

It is intended to be more than a marketing slogan. Currently there is a discrepancy between the beauty of the outlook and the appearance of the town. The vision would, it is hoped, focus the attention of stakeholders on reducing that discrepancy. That will, in turn, make Morecambe a more desirable place to live, work and invest.

It is likely that such a statement would be greeted with cynicism at the outset, as Glasgow's pretensions to be a cultural mecca were initially derided. It would, however, provide a focus.

It could also be adapted to fit more specific ambitions. For example, "a beautiful place to live", "a beautiful place to visit", "a beautiful place to work".

6.9 Improving the Seafront

The wide, traffic-choked, building line hugging Marine Drive does much to undermine the beauty of Morecambe and retard development. It has been reduced in size as a consequence of the TERN project, but is still too dominant and there is no obvious reason for it to be a major traffic artery.

In the long term, the key to making Morecambe a desirable place to live, and making its seafront an attractive investment opportunity for developers, is transformation of Marine Drive.

With the beautiful backdrop of Morecambe Bay and the Cumbria Hills, the Esplanade could be a magnificent public space. The TERN project has done a great job of improving the sea wall side – the challenge now is to improve the space up to the building line in such a way that investment is stimulated.

6.10 Upgrade of Central Promenade

Locum agrees with Lancaster District Council that the starting point for Morecambe's regeneration needs to be a comprehensive redevelopment of the Central Promenade area. It will be challenging to secure private sector investment and substantial public sector assistance will probably be needed to ensure a satisfactory result.

The Morecambe Bay Interpretation Strategy suggests a Morecambe Bay Interpretation Centre and this would be the logical place for it.

The aim should be to provide a high quality heart to the town – to integrate the quality elements of the new Morecambe – the Eric Morecambe Statue, the Stone Jetty, a restored Midland Hotel, the new Designer Outlet development – into a pristine, high quality public space that is connected to the retail centre.

The Council plans that the project should be planned in close conjunction with private sector developers, which is obviously the correct strategy.

6.11 The Challenge of the West End

The West End is at the heart of Morecambe's deprivation and housing problems, and the challenges of dealing with that are huge, but it does have the advantage of an attractive 'village' feel. It probably has the potential, in terms of urban grain, to be a vibrant quarter and a visitor destination.

Locum believes that the situation needs to be tackled from two directions:

- creating a reason for people to want to invest, live and visit the West End
- tackling more directly the social and housing problems.

As discussed in Section 2.16, the second of these requires bold initiatives by a variety of government departments and is beyond the scope of this report.

As regards the first, Locum suggests that, as the focus of an extensive programme to tackle the social problems in the West End, it is rebranded as a village (which gives a strong sense of identity and community), that a theme is chosen, and that an active programme for developing the theme is put in place. The key is to find a group that would be interested in leading the initiative. There are a number of possibilities, including:

- A creative quarter (of which there are many examples, one being Birkenhead's Hamilton Quarter);
- A book selling village on the model of Hay-on-Wye;
- An antiques village on the model of Petworth.

Eventually it could be an important part of Morecambe's revival as a destination.

6.12 The Imperative to Upgrade Quality Expectations

One of the most depressing aspects of Morecambe's descent has been the way that poor quality modern development has contributed to it. There do not seem to be any buildings of distinction constructed in the last few decades. Regrettably, this is true of key recent buildings such as the Festival Market, the Apollo Cinema and the new Railway Station. The inevitable consequence of this is that modern buildings rapidly look dated and start themselves contributing to the decline – the Superbowl is an example.

The same issue, of course, applies to operations like shops and restaurants. Morecambe desperately needs to attract operators who will raise standards to an entirely new benchmark level.

One of the reasons for the proposed vision statement "A Beautiful Place" is that it might encourage all stakeholders to start considering the impact of their work on the appearance of the town.

6.13 Employing Heritage to Best Effect

Morecambe has retained some outstanding buildings from its glory days that are critical to the town creating a distinctive and attractive sense of place, and developing new attractors. The Midland Hotel and the Victoria Pavilion are prime examples.

There may be a visitor attraction component to this, but Locum is of the opinion that commercial development, albeit possibly subsidised, is likely to be just as effective as an attractor and more sustainable.

6.14 Are There Viable Alternatives?

Could Morecambe regain its glory years as a family resort?

It could, for example, attempt a large-scale investment in one or more family-oriented attractions, like an indoor "Ocean Dome" or a northern version of Cornwall's Eden Project. It could complement that with high quality family-oriented self-catering accommodation.

The omens are not good, however: Morecambe has tried that strategy in the past without success. Locum suspects that, within a market that is rapidly declining, Morecambe would always struggle to compete with destinations like the Lake District and the West Country for family holidays. It is also not clear that trying to rebuild an inherently seasonal industry would be desirable, and the funding environment is not as favourable as it was for the Eden Project (which enjoyed the conjunction of Millennium Lottery Fund and Objective 1 funds).

It could, alternatively, try to develop as a major cultural centre. It could aim to develop an iconic cultural building equivalent to the Guggenheim in Bilbao. Perhaps a northern outpost of the National Gallery or the British Museum? This could be an even bolder version of the strategy being embarked upon by Margate with its proposed Turner Gallery. It would give the town prestige, create a new quality benchmark, and attract a new type of customer. It would fit well with the Lake District.

There would be much to be said for a bold cultural statement of that nature, but funding for such developments is more difficult now than it was when the National Lottery was dispersing huge capital grants for cultural projects, and it would require substantial revenue funding. Ultimately, it would not resurrect Morecambe's past – it would be a means of delivering the vision that Locum suggests in a perhaps more powerful way.

7. The Wyre Coast

7. The Wyre Coast

7.1 SWOT Analysis

Strengths	*Weaknesses*
● Broad based economy. ● Attractive resort heritage, especially in Fleetwood. ● Fishing heritage in Fleetwood. ● Popularity of Cleveleys high street. ● Distinctive tourism niche. ● Success of Freeport. ● Fleetwood Market. ● Success of Fleetwood Marina. ● Success of caravan holiday villages. ● Successful events programme. ● Success as alternative accommodation. ● Tram heritage. ● Outstanding nature sites. ● Fleetwood ferry terminal. ● Historic buildings such as 3 lighthouses and Decimus Burton designed buildings. ● Knott End a very pleasant small community.	● Severe deprivation, especially in Fleetwood. ● Insufficient resources to maintain and upgrade huge infrastructure. ● Poor road access to motorway network. ● Poor rail access. ● Lack of connection between Freeport and Fleetwood town centre. ● Fleetwood town centre looking tired and not prosperous. ● Poor access to Knott End, especially with non-operation of ferry from Fleetwood.

Opportunities	*Threats*
● Investment in sea defences. ● Freeport expansion. ● Better linkage of Freeport and Fleetwood . town centre. ● Fisherman's Friend is based in Fleetwood. ● Becoming a key part of stronger Fylde Coast brand. ● Upgrade of tram system.	● Further decline of key industries ● Loss of ageing customer base for tourism offer, especially in Cleveleys

7.2 A Distinctive Niche

The Wyre towns of Fleetwood and Cleveleys have developed a distinctive tourism niche, characterised by:

- Dominance of holiday village accommodation, especially static caravans – of almost 16,000 bed spaces in the Borough in 1995, 86% were within caravan or holiday home parks[5]. The proportion is likely to be higher now.
- A large day visitor market attracted by bargain shopping, especially Cleveleys High Street, Fleetwood Freeport, and Fleetwood Market.

It is an elderly, C1/C2 dominated business, but one which appears to be quite successful. Unlike the traditional serviced accommodation sector, self-catering has performed well, as has retail-oriented day trips.

5 A New tourism strategy for Wyre, 1996

7.3 Severe problems of deprivation

Wyre has between 400 and 500 houses in multiple occupation, many of which are in the Fleetwood wards of Pharos and Park, two of the most deprived wards in the region.

7.4 The Access Problem

The Wyre resorts are on a limb and access is a serious problem. The A585 link to the motorway network is poor, but a proposed link to the M55 has not been categorised as a regional priority. The rail only gets as close as Poulton-Le-Fylde.

This is a major obstacle to the regeneration of Fleetwood.

The proposed upgrading of the Blackpool tram system is important, and strengthens the case for a sub-regional approach to tourism development on this section of the coast.

7.5 Fleetwood

7.5.1 A Challenging Situation

Fleetwood is unlike the other resorts in that its heritage is as much a fishing town than as a resort. It also has a major industrial and port economy.

The old-style beach holiday business has almost gone, but Fleetwood retains power as a destination, the main attractors being:

- Large static caravan sites;
- Fleetwood Market;
- Freeport Designer Outlet built alongside a new and successful marina.

Other attractors include the tram, historic buildings, fishing heritage, the Victorian promenade and pier, and the nearby Wyre Estuary Country Park.

The resort side of town is charmingly old-fashioned, with an excellent Marine Hall complex, a fine model boating lake, and a pier (currently vacant). The town has a substantial events programme, including Transport, Folk and Bowling Festivals. The town centre is attractive, but not in the best of health.

A difficulty with Fleetwood is that the destination elements are widely dispersed and linkage between them is poor. Freeport is disconnected from the town centre (although there is a plan to enhance that connection as part of a substantial development), which is in turn disconnected from the seafront. Initiatives have been taken to address this – such as a road train – but they only have a limited impact.

7.5.2 Too Much Infrastructure Needing Care

The infrastructure of Fleetwood is so large in relation to the current economic base of the town that it presents major challenges. The town centre, the promenade and the dockside area are all in need of significant investment. That in itself will not attract enough visitors to offer a sensible financial return from tourism alone. The prospects in the medium term of enticing hotel development and a significant high value tourism spend are low.

7.5.3 Vision: UK Capital of Value

Fleetwood has many advantages that it can, does and should use in attracting visitors – for example, its heritage, wildlife sites, etc.

Locum suggests, however, that greater economic benefit could materialise if Fleetwood makes a full-frontal pitch to exploit the niche that it has already developed – as a place to go for bargain shopping.

It could brand itself as something like "UK Capital of Value".

The entire town centre could be co-ordinated to that end with the active participation of the retailers. It could be a High Street version of Cheshire Oaks. No other town has tried this and its concept could be extended by developing a regular, large scale, professionally-managed car boot market (an idea already being investigated).

The key would be to do this in a professional manner. People go to places like Freeport because they are attractive and well presented, they shop in stores like Matalan for the same reason and that would have to be true of the Fleetwood offer. It should be accompanied by investment in the town centre and strong branding – on signs, on the trams, on Blackpool marketing material, etc.

7.5.4 Upgrading the Town Centre

With the vision outlined above in mind, Locum suggests significant public sector-led investment in the public realm working *in conjunction* with private sector developers to implement the strategy.

7.5.5 A Novelty: the Fisherman's Friend

A novelty that would fit well with the branding suggested above would be to exploit the fact that Fisherman's Friend originated from Fleetwood and is manufactured there. It is a major international brand with a quirkiness that can help Fleetwood create a more interesting and distinctive sense of place. It would have to be seen by Fisherman's Friend as a marketing initiative and be entirely consistent with their brand values, but would also be a contribution from them to the community. It would probably have more impact as an attractor than a conventional museum or heritage attraction, and could have a major role in drawing people from Freeport to the town centre.

7.5.6 Fishing Tourism

There are emerging research and funding opportunities into the possibilities for diversification to boost local fishing industry revenue. A fishing tourism offer in Fleetwood could include:

- Boat tours and sea angling
- Interpretation/viewing galleries for harbour, boat repair, filleting lines, etc.
- Improvements to the harbour and linkages with Freeport and the marina (there is a need for public realm improvements).

7.6 Cleveleys

Cleveleys has a relatively attractive high street that runs towards the seafront. It is flat and level, which appeals to elderly people, and has a good traditional club culture. Like Fleetwood, it has a niche in the market. Coach groups come from distant parts attracted by the shopping offer in Cleveleys, and this is the focus that Locum suggests for the vision.

There is a development opportunity at Jubilee Gardens, for which the Council has in mind a leisure-orientation. Realistically, Cleveleys is primarily now a residential area for the retired and commuters, and doing relatively well as such. The main focus should be on maintaining its vitality as such.

7.7 Knott End on Sea

This is a relatively tiny community – primarily residential – and, given the magnitude of the issues elsewhere on the coast, Locum has not addressed attention to it. Nevertheless, it is a very pleasant place, one that will attract visitors, and it is another example of a situation where investment in the public realm will produce excellent results and help sustain an isolated community.

7.8 Fitting into a Stronger Sub-Regional Brand

Although efforts have been made to develop Wyre as a destination brand, it is an uphill task. Wyre has a product that complements that of Blackpool very well, and it would possibly be more sensible for their branding and marketing to be combined into a wider Fylde Coast brand.

8. Blackpool

8. Blackpool

8.1 SWOT Analysis

Strengths	*Weaknesses*
● Well located. ● Fairly good accessibility. ● Still substantial visitor base. ● Substantial customer loyalty. ● The Illuminations. ● Quality of Blackpool Pleasure Beach. ● Evocative heritage. ● Strong local partnership. ● Brand has positive attributes.	● Severe deprivation in inner areas. ● Unbalanced economy. ● Shabby product. ● Shabby environment. ● Inadequate investment in the tourism offer and infrastructure. ● Weak retail offer. ● High retail leakage. ● Few office workers in central area to sustain retail. ● Conflict between retail and night economy. ● Lager lout image. ● Traffic blight on the Esplanade. ● Illuminations looking tired. ● Cost of Illuminations (£2.5 million pa). ● Too many small hotels and guest houses. ● Failure of small hotels and guest houses causing urban blight. ● Extreme price competition in serviced accommodation sector. ● Too few branded hotels. ● Little open space in urban area. ● Land assembly for development is difficult. ● Brand has negative attributes.

Opportunities	*Threats*
● Resort casinos (especially if Blackpool has a degree of exclusivity). ● SRB 6 and Sea Defence investment. ● Economic Development Zone status. ● Conference trade. ● Weekend breaks for working people, weekday breaks for empty nesters. ● "Manchester by the Sea". ● Development of night economy. ● Upgrading of tram system. ● Potential of airport for incoming trade.	● Gambling reform does not go ahead or is neutered. ● Failure to take dramatic action results in catastrophic failure.

8.2 A Town Plagued by Severe Deprivation

Economic decline has brought severe deprivation to Blackpool, especially in the inner wards. As Blackpool's regeneration strategy points out, the high deprivation levels in themselves imperil its status as a destination by destroying its character as a "pleasant and attractive place to visit".

Tourism dominates Blackpool's economy, directly employing about 25% of workers. Small businesses predominate – only about 70 companies employ more than 70 people – but they are not in a healthy state. The number of VAT registered businesses fell by 12% between 1995 and 1999.

Although reliable figures are hard to come by, the number of staying visitor bednights in the town seems to have declined from about 14 million in the mid 1990s to about 9.5 million now[6].

8.3 A Modern Resort

The vision being advanced in Blackpool is for a modern resort offering world-class standards in conferences, entertainment, retail, and nightlife. The vision is not for incremental change, it is for wholesale change.

That has to be the case if Blackpool is to succeed as a modern resort, tinkering will not do. Even the construction of a new conference centre would probably only lessen the inevitable decline.

Blackpool will only become a modern resort with massive investment and massive change.

8.4 The Crucial Importance of Resort Casinos

Most of the massive investment will inevitably have to come from the private sector. The reason that resort casinos are so important is that they will offer credibility to the prospect that Blackpool really can be transformed.

8.5 The Case for Exclusive Resort Casino Rights

The number and size of the casino developments that Blackpool will support will be determined by the private sector and it is very difficult at this stage to know what that is likely to be.

The circumstances are different to those that allowed the development of Las Vegas and Atlantic City to regenerate on the basis of gambling. Both had the advantage of being the only places within their catchment areas that could issue gaming licences. Indeed, Atlantic City has been struggling recently as its monopoly has been eroded, while Las Vegas has invested massively to create a broader-based destination offer.

The promoters of resort casinos are attempting to persuade the government that the proposed reform of gambling should contain provisions to encourage the development of resort casinos in destinations like Blackpool. In effect, they argue that casinos with a large number of slot machines should only be allowed in designated areas and should be accompanied by large scale support investment like hotel rooms and convention/entertainment facilities. Their argument is that the liberalisation of gaming should be used to leverage the greatest possible social and economic benefit, and that can best be achieved in the seaside resorts where there are huge problems. They further argue that unrestricted gaming nation-wide, on the Australian model, is more likely to lead to social problems such as gambling addiction.

Their arguments have much weight, and it is unquestionable that there would be much greater investment in Blackpool if the legislation was framed in such a way as to encourage resort casinos there. Blackpool is the most obvious place in the country for this type of development, and one of the most difficult regeneration challenges.

This is a matter of importance to the whole Northwest, and there is a strong case for stakeholders giving strong backing to Blackpool on this issue.

6 NW Coastal Resorts Initiative/UK Travel Survey/NWTB

Nevertheless, Blackpool will not have exclusive gambling rights in the UK and casinos will be more widely dispersed in the UK than in the United States. Operators are space banking all over the country and several towns and cities have announced their intention to host casino developments, albeit not of the scale of Blackpool.

Even so, Blackpool does have the making of the primary gambling resort in the UK – good catchment area, good transport, lots of potential development sites in order to create critical mass. Casino resorts should be an important cornerstone of its regeneration.

8.6 Contributing to the Wider Economy

A feature of the gambling-based regeneration of Atlantic City and Biloxi in the United States has been taxation of the casino revenue for direct input into the resort infrastructure. This is another principle for the region to campaign for.

8.7 The Vision: Europe's No 1 Resort

Quite simply, if Blackpool is to succeed, it must make itself the best all round resort in Europe.

8.8 Peer Group

The New Blackpool should consider its peers, in status and quality if not size, to be Las Vegas and Orlando.

8.9 Six Pillars of the New Blackpool

Locum endorses the vision being outlined in Blackpool of an integrated modern resort, and suggests that the new Blackpool should be built on the foundations of six major initiatives:

1. Making the Golden Mile Golden – concentrating the entertainment offer, landscaping and traffic reduction in conjunction with comprehensive redevelopment of the seafront property-line for entertainment, food and beverage, casinos, and serviced accommodation.
2. Creating the UK Convention Capital – the provision of a new convention centre and hotel development/refurbishment to make Blackpool the undisputed convention capital of the UK.
3. Nightlife Nirvana – stimulating a first rate, cutting edge youth-oriented nightlife offer (in addition to a world-class casino-based entertainment offer) by designating an area where it can be developed and actively managed.
4. Resort Casinos – large, modern, high quality spa resorts built around casinos offering, in the style of Las Vegas, a top quality entertainment product.
5. Retail Revamp – comprehensive redevelopment of the retail core of the town with the Winter Gardens as the centrepiece and primary attractor.
6. Outstanding Access – making it quick and easy to get to the heart of the town from major urban centres, especially Manchester, so as to encourage commuter, day visit and short break business. This includes future development of the airport for incoming trade.

8.10 Zoning

As the consultation document for the new Blackpool local plan points out, there is a lot of conflict between different town centre users. In Locum's experience:

- Night economy conflicts with residential
- Tourism accommodation conflicts with residential
- Leisure conflicts with retail
- Business tourism can conflict with leisure tourism

The consultation document suggests careful zoning to ensure that these conflicts are reduced. Locum endorses this. Apart from reducing conflict, the other reason for doing so is the need to concentrate and create critical mass.

8.11 The Destination Brand

There are certain aspects of the Blackpool brand image that should be retained – bold, innovative, slightly risqué.

There are certain aspects that it should lose – cheap and cheerful, chips with everything, tawdry.

8.12 The Night Zone

As in many UK towns and cities, the night economy is a source of problems in Blackpool. It is even more contentious than normal due to the abundance of cheap accommodation in the town that is popular with Stag and Hen parties, which although bring business (indeed, is the one part of the Blackpool economy that is growing) but are off-putting to many members of the community and potential visitors. The night-life has got out of kilter with the rest of the economy and the failure of regulation and infrastructure to keep pace is causing unnecessary difficulties.

It is widely recognised, including by the Police, that the key to dealing with this is liberalisation of the licensing laws to allow staggering of closing times. Some cities, such as Bournemouth, have already successfully deployed a policy of staggered closing times. The Government has been promising reform for a long time and has said that it will be included in the next parliamentary session.

In Blackpool, the night economy has developed in close proximity to the retail core, and this may be a reason why the retail area is performing so poorly.

The night economy has the potential to be a major part of Blackpool's renewal. However, because of its potential to cause aggravation, needs to be carefully managed.

The advantages of creating a clear night zone are as follows:

- Investors know where they stand. Conflicts with other potential uses, especially residential and retail, can be reduced because people know that the area will feature night activity.
- The infrastructure can be put in place to make it safe and attractive to users. This includes CCTV, lighting, and secure and managed taxi and public transport hubs.
- It can be managed more effectively. Police resources can be more effectively deployed, operators can be better co-ordinated, and people who cause trouble can be excluded.
- It is easier to put in place mechanisms for operators to contribute to the funding of special measures. Night zones are particularly good candidates to become Business Improvement Districts.

Having put these planning and control mechanisms in place, Locum suggests that Blackpool actively aims to develop a clubbing product that is better than anywhere else in the country. The ready availability of low priced accommodation is a great advantage in this respect.

8.13 Style of the Resort Casino(s)

Ultimately, the developers will decide what style or theming will attract customers and the pastiche style of Disney and the 1990s Las Vegas developments certainly appeal to the public. Arguably, Blackpool is one place in the UK where it can work.

There is, however, a danger that carbon copying the Vegas approach (the Egyptian theme proposed for the first Blackpool development, for example, mimics the Luxor Casino in Las Vegas) will seem tepid and dated and very '90s' by comparison. It is also debatable whether the British have sufficient panache (some would say, lack of taste) to successfully bring off such developments.

The Eden Project in Cornwall has demonstrated that the public can be just as excited by imaginative modern architecture as by pastiche. An equally innovative architectural solution on a prime site near the Tower could, at a stroke, change Blackpool's image and create a new icon.

8.14 The Golden Mile

The masterplan commissioned by Blackpool will identify where the key public sector interventions should be made but Locum suggests that the first priority is likely to be making possible the complete redevelopment of the promenade, especially between the North and Central Piers. This could include a complete revamping of the Illuminations, perhaps making them pedestrian based rather than car based in order to increase the amount of spend in the town.

8.15 Convention Centre

Provision of a world-class convention facility will be critical to sustaining a year round tourism business in Blackpool. It is likely to need to be led by the public sector, although it may instead be incorporated in the casino resort development(s).

8.16 Housing Clearance and Property Assembly Near the Seafront

The regeneration of Blackpool will be difficult while the central tourism area is blighted by low-quality housing and social deprivation. The public sector needs to take the lead, through the use of compulsory purchase orders and other means, in tackling the problem and assembling sites for redevelopment.

9. St Annes on Sea

9. St Annes on Sea

9.1 SWOT Analysis

Strengths

- Attractive 'garden town' ambience.
- Attractive Victorian architecture.
- Broad tree-lined streets.
- Promenade and Ashton Gardens.
- Attractions including the Pier, Pleasure Island Complex and many cafes and restaurants.
- Hotels with business conference facilities.
- Good links to motorway and rail networks.
- Higher income residential population.
- Good housing stock.
- Proximity to attractive Lytham.
- World famous golf course.

Weaknesses

- Vacant floorspace.
- Deterioration of some town centre properties.
- Decline of the retail offer in some sectors.
- High retail leakage.
- Strong sea winds can create an uncomfortable town centre environment.
- Poor quality public realm and worn out street furniture.

Opportunities

- Restoration of Promenade and Ashton Gardens to original splendour.
- Restoration of Victorian architecture within the conservation area.
- Further development of restaurant and café sectors.
- Reinforce the 'garden town' ambience with further tree planting and regeneration of the public realm.
- Illumination of buildings.
- Complement to Blackpool offer.
- LRT linking Fleetwood, Blackpool, St. Annes on Sea and Lytham.

Threats

- Further competition from retail development like Preston's Tithebarn.
- Loss of heritage and attractive architectural features.

9.2 The Twin Towns

Probably because of the fame of the golf course featuring their names, Lytham and St Annes are probably inextricably linked in the minds of many people.

From a marketing point of view, it probably makes sense to take advantage of that perception and present them as an entity.

St Annes on Sea is the Victorian seaside resort, and, for that reason, this report focuses on it. It has the majority of the accommodation bedstock. Unlike in Wyre, tourist accommodation in St Annes is dominated by serviced accommodation, and there are a number of hotels, especially on the seafront, that have been investing and seem to be performing well.

Lytham is a town by the sea. It has a different set of problems and potentially different opportunities and solutions.

Both have successfully diversified their economies away from tourism although St Annes still has significant social problems resulting from decline of the traditional tourism economy – deprivation, Houses in Multiple Occupation etc.

9.3 Vision: A Classic Resort

St Annes, especially in combination with its twin town Lytham, is a high quality destination and an important tourism and recreation asset for the region.

Like Grange, St Annes is already a long way down the road to having the attributes Locum has in mind for the Classic Resort hallmark: it retains the spirit of a traditional resort, including a charming pier, and it has pleasant shops, bars and restaurants, etc.

In its regeneration work so far, Fylde Borough Council has shown an empathy with the vision that Locum has in mind and Locum endorses their strategy.

9.4 Fitting into the Fylde Coast Sub-Regional Brand

As outlined in Section 3.3.4, St Annes and Lytham will have a distinctive niche within the Fylde Coast destination. Whereas there is currently a discrepancy between the type of visitor attracted by St Annes and Blackpool that is likely to diminish as the 'New Blackpool' emerges. People who enjoy the casino resorts are also likely to enjoy the chic shops and genteel ambience of St Annes and, indeed, will help to provide the customer base to sustain that ambience.

9.5 Regeneration Strategy

During 1998, Fylde Borough Council embarked upon a comprehensive regeneration strategy for St. Annes on Sea.

The starting points for this renewal process were the establishment of an Urban Design and Regeneration Unit within Fylde Borough Council, and the production of an Urban Design Guide. The latter won a regional award from the Royal Town Planning Institute, and is a good precedent for other resorts.

This has led to extensive refurbishment of the town centre and, recently, the NWDA have awarded £1.75 million to complete the refurbishment of St. Annes Square over a 3 year period commencing April 2002.

In addition, a 'Heritage Economic Regeneration Scheme', with funding from English Heritage and Fylde Borough Council, is being used to aid the repair of buildings within the conservation area and for further public realm works to complement the NWDA investment. This is a vital preventative measure to ensure the continued viability of buildings, and reinstate original architectural features for example, shop fronts, decorative ironwork and stonework.

The Council has also been successful in obtaining funding from Lancashire Tourism Partnership SRB Scheme to develop a 'café quarter' centred on Wood Street in the town centre.

St Anne's town centre has been suffering under weight of competition and the St Annes on Sea Development Partnership has focused on environmental improvements, which we believe to be the right response. Although not complete, it already seems to be having an effect in revitalising the town.

9.6 Refurbishment of the Seafront

The next key project is refurbishment of the seafront gardens to make them consistent in quality to the town centre. This is an obvious next step in progressing towards the Classic Resort vision.

10. Southport

10. Southport

10.1 SWOT Analysis

Strengths	*Weaknesses*
● Comparatively wealthy community. ● Appeal to high spend customers. ● Lord Street. ● Victorian Parks and seafront infrastructure. ● Marine Lake. ● Good reputation for shopping. ● Major theme park. ● Substantial conference venue. ● Churchtown. ● Golf courses. ● The Flower Show. ● Strong events programme.	● Pockets of severe deprivation. ● Decline of shopping experience. ● Small size of town centre retail units. ● Lack of town centre development sites. ● Shabbiness of seafront. ● Poor range and quality of serviced accommodation. ● Problems resulting from night economy. ● Poor road access.
Opportunities	*Threats*
● Objective 1 funding. ● Focus on high value markets. ● Restore Victorian seafront glories. ● Exploit Marine Lake. ● Upgrade Lord Street. ● Golf. ● Outdoor activities like cycling, walking and sailing. ● Birdlife reserve on the Ribble.	● Further decline of retail offer, exacerbated by edge of town development and poor road access. ● Futile investment in efforts to recapture lost markets. ● Insensitive development spoils the unique sense of place.

10.2 A Jewel in the Northwest and Merseyside Crowns

Southport is a superbly attractive town and has potential to be a real jewel in the regional crown: an English Deauville, a “Chester-by-the-Sea”. This would be entirely suited to the destination market in 2002, a fantastic leisure resource for people living nearby, and an important regional tourism resource.

Southport has an exceptionally beautiful high street, one sustained by a prosperous local community and still regarded as a destination for people living all over the Northwest. It has a lingering local reputation for being genteel.

Southport also has a past as a traditional seaside resort and like other resorts, that element has declined almost to the point of extinction.

Southport is much better positioned to make the transition to the new circumstances than Morecambe and Blackpool. It is very easy to see its physical assets being deployed in such a way as to create a chic, stylish town that is much more attractive as a shopping and cultural destination than any manufactured out-of-town shopping centre could be. The strength of this asset has meant that it has not declined to the same extent as Morecambe and Blackpool. Its core offer appeals to an affluent market.

In surveys, shopping/Lord Street is quoted by over 70% of visitors to Southport as the reason for them visiting the town[7], double the percentage attracted by the seafront. In a shopping survey in August 1991,

7 Sefton MBC, Merseyside TEC, Business Link – Tourism Southport, Survey of Visitors 2000

54% of the people questioned in the town centre were from outside Southport[8]. When asked why they were there, they said it was because of its "good choice of shops and its character and its general atmosphere".

The research undertaken for the North West Coastal initiative in 1994 also presented a clear picture in this respect: Lord Street was quoted by recent visitors as the 'biggest advantage' of the town by a very great margin.

Although there has been investment in Lord Street (in particular, the Lord Street gardens were restored in 1998 at a cost of £1.9 million), the health of the street does not seem to have been at the top of its priorities.

In the meantime, retail competition elsewhere has been getting stronger. It is hardly surprising, therefore, that Lord Street is struggling. Visitors are more likely to find a discount shop rather than a fashion boutique. In Locum's view, it is a wasted opportunity. Southport neglects Lord Street at its peril.

10.3 The Vision: Style and Sophistication

In Locum's opinion, Southport should firmly focus on being known as a place with 'style and sophistication'. This should be carried through to every aspect of the product and promotion.

Southport is in the rare and fortunate position of having a product that is well positioned to attract affluent customers. Ironically, most other destinations – Blackpool and Morecambe are examples – make this their priority, but with less chance of success than Southport.

By targeting high value customers, Southport will achieve mass-market appeal because it will appeal to the *aspirations* of the mass market. It is not a question of targeting a tiny, exclusive niche. It is about appealing to a Daily Mail audience.

Southport has the opportunity to carve out a special niche. If it fails to do so, decline as a destination is likely. Liverpool and Preston are both planning huge retail developments and Manchester city centre has been transformed to boast prestigious fashion outlets. Regional retail destinations like Cheshire Oaks and the Trafford Centre are also constantly upgrading.

10.4 Peer Group

Southport should consider its peer group to be towns like Bath, Baden Baden, and Deauville.

10.5 Quality of Life for Locals Should be the Priority

By concentrating on improving the quality of life for local people, especially in terms of the town centre, seafront environment and the cultural offer, Southport will do more to position itself as a destination than an overt emphasis on tourist attractions and new hotels (which will follow if the private sector sees the possibility of a return). Most importantly, by improving the quality of life, Southport will also make itself a more attractive destination for non-tourism related investment.

10.6 Using Lord Street as the Foundation

As Southport's current application to the Heritage Lottery Fund's Townscape Heritage Initiative states, Lord Street's *"combination of a long and wide tree lined street, cast iron verandas, public and private gardens make for a unique townscape not only in Merseyside but also England".*

The width and character of Lord Street makes it potentially a superb public space and ideal for events, special arts installations, markets (books, antiques, etc.), flower displays, pavement cafes, promenading – the kind of activities that appeal to many people.

8 SMBC, Retail Strategy Review 2001

The streets on either side, especially leading to the Promenade, offer the ideal urban grain for the continuation of the offer with interesting small shops, much like The Lanes in Brighton. These streets are currently dominated by obsolete remnants of the old bucket and spade offer.

The challenge for Southport is to keep improving the Lord Street experience, and then to extend it to the seafront. It should no longer be a case of walking from one world to another. There should be synergy between the two experiences.

Locum suggests that there should be a major upgrading of Lord Street with partial or complete removal of traffic. This could be done in conjunction with a Business Improvement District to facilitate input (financial and otherwise) of operators and property owners.

Southport has the right qualities for a top-quality cultural offer, and the upgraded Lord Street could ideally feature a major renewal of the Southport Arts Centre. A good possible model is the Millennium Gallery in Sheffield which is a partnership between Sheffield Museums, the Tate and the V&A and rotates exhibitions from their collections.

10.7 Creating a More Focused Brand

Looking from the outside Southport's brand is confusing. This is mainly due to the contrasts in style between Lord Street and the seafront, but the image conveyed by the town's publicity material is also slightly "bucket and spade" in feel.

Most aspects of the Southport product are already entirely in keeping with the proposed positioning, including:

- The Flower Show, an outstanding brand which Southport should develop further;
- Events such as the Jazz Festival;
- Royal Birkdale and the golf offer.

Pleasureland could also be repositioned to target a middle class family audience – the Alton Towers audience.

Being in a peripheral location, Southport has to compete as a destination on grounds of quality. As in other resorts, private sector investment in the last decade has not been on the same scale as in the cities. For example, there have been no new hotels.

Locum believes that Southport should not simply aspire to 4 star quality, which is commonplace in cities, but it should be trying to create an experience that is truly world class. It should try to attract world-class designers and architects, Michelin rated restaurants, and hotels featured in the Good Hotel Guide. It should benchmark against top-quality destinations like Deauville in Normandy and Baden Baden in Germany.

In order to do this, however, there has to be total commitment from stakeholders. It will be a hard task to convince investors and that will only be achieved if they are convinced that the vision is rock-solid and focused.

10.8 Developing Conference Trade

Locum agrees that developing a stronger conference business would be very helpful to the local economy, especially as this business is non-seasonal. The potential appears to be limited by the lack of hotel rooms of adequate quality and the town has been trying to attract a branded four star hotel.

Locum believes that the impending liberalisation of the gaming laws may help in this respect, and that Southport's product could be entirely in tune with a destination casino, spa and convention resort.
It would be smaller and of a different type to that proposed for Blackpool – Southport would be aiming tobe Deauville rather than Las Vegas. It would be competing against Harrogate.

Ideally, the casino would be in a prominent central position on the Promenade and of the highest possible design quality.

10.9 The Access Problem

Increasing congestion on the main access roads are perhaps the biggest threat of all to Lord Street and ceiling on Southport's abilities to secure investment.

10.10 Lord Street/Seafront Renewal

Locum endorses the thrust of the Southport Seafront Action Plan[9] that has recently been submitted to the Government Office for the Northwest for Objective 1 funding.

It covers the area from Lord Street to the Seafront and includes the following key projects relating to the physical infrastructure:

- Extending and improving the hotel provision
- Improvements to Concessions
- Marine Lake dredging and desilting
- Upgrading the Pier including a new entrance
- Pleasureland/Funland extension and improvements
- Creating formal and informal performance space (Victoria Gardens/Princes Park)
- General environmental enhancement
- Reopening Marine Parade bridge
- Pedestrian and cycle route improvements
- An Eco Centre

Locum does so, however, with the following caveats:

- The focus should be on Lord Street, the space between Lord Street and the seafront (covered by the Townscape Heritage Initiative), the Gardens and the Marine Lake – making them all of consistent quality.
- The aim should be to secure for a focal site a 5-star (in style if not actual rating) spa/casino/hotel development rather than simply a 4-star hotel (which would be fine for a less prominent site if the private sector can be tempted).
- Public funding should support environmental improvement and the enhancement of cultural facility to the benefit of Southport residents, and not to shore-up the bucket and spade or theme park offer (if they are viable, the private sector will invest). Environmental improvement should include the removal of obsolete remnants of the bucket and spade offer.
- Pleasureland should be encouraged to target their offer at a middle-class audience.

The criteria that should be applied to every project is:

- Does this make Southport a more stylish and sophisticated place?
- Does this fit well with Lord Street?

9 Sefton Metropolitan Borough Council, The Southport Partnership/Central Southport Partnership 2002

10.11 Eco Destination

Locum is aware of proposals to create a birdlife sanctuary and visitor centre of national significance near Southport. This could have a significant impact in raising the image of the town and its success as a destination and could be the focal point of the regional eco branding suggested in Section 3.2.

11. The Wirral coast

11. The Wirral coast

11.1 New Brighton

11.1.1 SWOT Analysis

Strengths	*Weaknesses*
● Large day visitor catchment area. ● Good rail links. ● Good road links. ● Substantial investment in environment. ● Socially balanced community. ● Many people have fond memories from the past. ● Floral Pavilion. ● Attractive and historic Fort.	● Loss of built heritage. ● Peripheral location. ● Poor current image. ● Credibility issue due to failure of previous development schemes.
Opportunities	*Threats*
● Mixed use redevelopment. ● A beacon attraction at the mouth of the Mersey. ● Focus for cycling and walking. ● Better utilisation of the Fort. ● Availability of Objective 1 funding. ● New Ro-Ro ferry terminal nearby.	● Failure to find a solution results in continuing decline. ● Poor quality solutions leads to worse problems down the road.

11.1.2 An Interesting Opportunity

Of all the resorts covered in the project New Brighton has fallen the most. Once known as 'the Playground of the North', there is little left as a reminder of those glory days.

The Merseyside Development Corporation invested £13 million into environmental improvements in the 1990s, but they were unsuccessful in pump priming private sector investment. There is a significant night economy, including the successful Floral Pavilion theatre venue, and the promenade is popular for walking and cycling, but it is dead as a staying resort.

The Metropolitan Borough of Wirral identifies New Brighton as being the Borough's best opportunity to attract significant leisure. Ambitious schemes have, however, been mooted in the past and ended in disappointment. The Borough has recently appointed a lead developer who is proposing a mixed-use scheme which includes – Casino, refurbished Floral Pavilion, Pier, Outdoor Pool or Lido, an Eventing 'Amphitheatre', Restaurants and Bars, Mini-Plex Cinema and Sport and Health facilities. The proposals also include retail and residential elements.

The developer has made it clear that the scheme will be sustained by the local community and Locum believes this to be the correct approach. The developer has a good record of integrity and quality in their work.

The scheme, with a total investment value of £65 million, requires on current projection, a grant level of £10 million.

11.1.3 A Beacon Attraction

An interesting idea has been developed for a beacon attraction at the mouth of the Mersey at New Brighton – a 180 ft statue of Poseidon, God of the Sea – representing the quintessential maritime nature of the area and the importance of the sea to the sub-region. The monument, with a range of tourism applications, would be in the shape of Poseidon as a young man. Like the Statue of Liberty it would have internal access and exhibition space.

The word 'icon' is overused when it comes to attractions – they are few and far between, and normally only result from an unpredictable combination of inspiration and circumstance. The proposed statue does appear to have more chance than normal of becoming truly iconic, especially if it could be positioned as a twin to the Statue of Liberty.

The interior could be used, for example, to tell the story of, and record the names of, people who emigrated to the New World through Liverpool. This could have a strong resonance in the growing genealogy market.

It is possible to envisage it generating an enormous amount of publicity and local comment as it is constructed at Cammel Laird, and then as it is towed down the Mersey. It is also possible to envisage it being a star attraction on the Mersey Ferries tourist route. That in turn could provide alternative access to the city centre for commuters, and would fit well in terms of sustaining the proposed mixed-use development at New Brighton.

By providing excellent linkages down the coast – for example, the facility for one-way cycle hire along the coast/river to Hoylake/West Kirby and Seacombe, it is easy to imagine a positive effect for the whole region in terms of quality of life, recreation, and tourism. There is, unfortunately, always the risk that the Poseidon idea will not capture the public imagination, but it seems to be the best single idea for an attractor that Locum has come across in the Northwest.

11.2 Connecting to the North Wirral Coast

The North Wirral coast is a superb recreational facility for Merseyside:

- There is good access by road and rail
- The views, especially from West Kirby, are excellent
- West Kirby and Hoylake are attractive towns with the potential to be very attractive
- Marine Lake at West Kirby is outstanding for sailing and watersports
- There is cycling from New Brighton to Hoylake
- Excellent golf courses

Although all the ingredients are there, they need a little polish to make them a really outstanding recreational resource. A comparatively small investment will go a long way.

11.3 Hoylake and West Kirby

11.3.1 SWOT Analysis

Strengths	*Weaknesses*
● Pleasant, Edwardian ambience. ● Prosperous local communities. ● Strong community spirit. ● Pleasant independent shops. ● Glorious views from Promenade. ● The Royal Liverpool Golf Club and return of the Open.	● Looking tired. ● Lack of hotel accommodation.
Opportunities	*Threats*
● Improvement of attractiveness by investment in public realm. ● Better use of recreational infrastructure. ● Integration into strong Wirral Coast Offer with regeneration of New Brighton. ● Ancient history of Roman and Viking settlements at Meols. ● Merseyside Objective 1 funding.	● Increasing retail competition results in further decline of town centre offer.

11.3.2 Pleasant Twin Towns

Like Lytham and St Annes, these two pleasant towns flank a renowned golf course. They are both doing well as commuter and retirement communities but their town centres are looking tired and struggling to compete with retail developments elsewhere, and the recreational facilities are not as good as they might be.

Because of their relative prosperity, they do not have the same access to funding as more deprived areas.

Providing the overall quality of the product is lifted within these two adjacent townships with their wonderful physical location there is no reason why they should not further attract the discerning visitor in other specialist short-break markets like birdwatching, sailing, coastal walking etc – as well as golf.

To achieve this in a competitive market Hoylake and West Kirby need to reinforce their gentle Edwardian charm, elegance and ambience.

The heritage of the area, particularly its maritime associations and its ancient history – i.e. the Roman and Viking settlements at Meols could also be addressed.

11.3.3 The Vision: Classic Resorts

Locum suggests that the towns should aim to have the qualities of Classic Resorts, even if not designated as such.

11.3.4 Investment Ideas

The Borough Council has identified a number of projects that would add polish, including:

- Improved access into the area.
- Appropriate enhancement and improvement to the Hoylake Promenade.
- Environmental improvements to the town centres including the possible re-instatement of the old Edwardian-style covered walkways.
- Improvements to the facilities of the West Kirby Marine Lake and its Promenade frontage.

The Council would wish too, to encourage improvements to the range and quality of the retail provision in the two townships.

They would also like to attract new hotel development, especially in cognisance of the return of the Open Golf Championship to the Royal Liverpool Golf Club (a golf resort would seem to be the most obvious means of persuading a hotel operator to invest).

In conjunction with the redevelopment of New Brighton, Hoylake and West Kirby could resurrect their role as places where the people of Merseyside go for recreation, and could be relatively strong attractors for tourists. Locum takes the view that Wirral Borough Council's strategy is entirely correct.

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