

8. LOCAL MARKET ASSESSMENT

Key Facts

- | | |
|---|--|
| <ul style="list-style-type: none"> • Despite strong growth through much of 2007, prospects for the UK economy in 2008 are seen to be considerably weaker due to a number of factors including the credit crunch and continued pressure on inflation • Blackpool's economy is still heavily reliant on the Tourism industry, despite declining visitor numbers in recent years. • Blackpool's economy is classed as performing poorly in terms of Gross Value Added, with the town ranking 23rd lowest among the 133 GVA Nuts 3 areas | <p>in the UK.</p> <ul style="list-style-type: none"> • The town centre retail market is characterised by a higher than national average vacancy rate, However, conditions have improved following the opening of Hounds Hill Shopping Centre in summer 2008. • Office and Industrial markets on the Fylde Coast are weak due to low levels of business formation in recent years. However, the take-up of business land in 2006-2007 was stronger than in any other of the past five financial years due to the success of Blackpool Business Park. • There has been little growth in office space in recent years, |
|---|--|

- | | |
|---|--|
| <p>despite aspirations to double major office employment in the town centre by 2012.</p> <ul style="list-style-type: none"> • The commercial context within North Beach is dominated by hotels and other holiday accommodation. • Industrial uses include an auto repair workshop and a self-storage facility | <ul style="list-style-type: none"> • The decline in tourism has affected North Beach significantly with the proportion of holiday properties on the market within North Beach increasing by nearly 14% over a 2 year period. • The retail market is confined mainly to fast food takeaways and a scattering of local shops, while a limited amount of office space is available above retail premises. |
|---|--|

Introduction

- 8.1 This section sets out the local commercial market context, assessing the condition of the retail, office, industrial and tourism sectors within Blackpool and North Beach.

The Economic Context Blackpool

- 8.2 Despite the continual decline in visitor numbers to the town, Blackpool's economy is still driven by the Tourism sector. According to the 2001 Census, 12.9% of jobs in the town are in

hotels and catering, compared to 4.8% in England and Wales, while figures compiled by ONS (2006) report that 17.8% of the 59,700 jobs in Blackpool are tourism related. Therefore, it is unsurprising that Blackpool's largest employer, according to data published by Experian in April 2007, is a company operating within the tourism sector- Blackpool Pleasure Beach, which employs 1,500 staff in its amusement park and arcades.

- 8.3 The largest employment sector in Blackpool is Public Administration, Education & Health, which provides 37.8% of jobs in the town, a significantly higher proportion than in the North West (27.8%) or Great Britain (26.9%). Other major employers are the Banking and Financial Institutions sector, with Halifax Plc (now HBOS) and National Savings and Investments each employing 1,000 staff. The largest manufacturers in Blackpool are both confectionary companies, Burtons Foods Ltd and Tangerine Confectionary Ltd, with around 500 employees each.
- 8.4 Local productivity can be measured in terms of Gross Value Added (GVA), which shows the strength of the local economy. Table 26 shows data relating to Blackpool's GVA in the latest available periods of 2004 and 2005.
- 8.5 In 2005, Blackpool had a GVA of £1.716 million, an increase over the 2004 figure of 1.674 million, which is the equivalent of £11,990 per head (£11,773 in 2004). These figures give Blackpool an index level of 67 compared to the size of the UK economy (UK value = 100). Therefore, productivity in Blackpool is substantially lower than the UK average. Blackpool's GVA per head is the 23rd lowest of the 133 GVA NUTS 3

areas in the UK, the 10th lowest in England and the 5th lowest in the North West. All of these rankings are worse than 2004, which indicates a general direction of decline in the strength of the Blackpool economy

Table 23: The Strength of Blackpool's Economy, measured by Gross Value Added (GVA) in 2004 and 2005

	2005	2004
Total GVA	£1.716m	£1.674m
GVA Per Head	£11,990	£11,773
Ranking within UK	23 rd Lowest	25 th Lowest
Ranking within England	10 th Lowest	12 th Lowest
Ranking within North West	5 th Lowest	6 th Lowest

(Source: ONS Website: NUTS GVA 3)

Retail Market

- 8.6 According to figures released in February 2008, the town centre vacancy rate in Blackpool stands at 10.4%, which compares unfavourably with the Retail PROMIS 200 centres average of 8.4%.
- 8.7 In October 2007, there were 49 reported town centre requirements in Blackpool, which ranked it the 151st town centre nationally in terms of demand. Since placing 98th in the rankings in October 2005, demand has fallen consistently over the ensuing two year period.

-
- 8.8 A £150 million, 18,580 sqm extension to the main precinct, the Hounds Hill Shopping Centre, opened in summer 2008. Anchored by a three storey Debenhams store, the new development also includes new branches of Next, New Look and River Island (previously located outside the precinct), while H&M, Costa Coffee and La Senza now have a presence in Blackpool for the first time.
- 8.9 As of September 2008, 25 town centre retail premises were listed as being available through various agents by shopproperty.co.uk. These included 11 units within the Hounds Hill Shopping Centre, and large premises formerly occupied by Next and River Island, now both relocated to the precinct. This indicates that despite the provision of a large, high profile shopping centre development, Blackpool town centre may still be characterised by a proliferation of vacant shops.
- 8.10 However, with the opening of the new extension to the Hounds Hill Shopping Centre and the new Debenhams store, Blackpool now has 18 of the top 20 retailers, ranked by ORC's forecast of average town centre sales, present within the town centre. Only John Lewis and Co-Operative Department Stores remain absent.
- 8.11 However, with the recent economic downturn, it is likely that there has been a rise in the number of vacant units or a change in the type of retail outlets locating in the centre of Blackpool.
- 8.12 According to the Annual Monitoring Report, published at the end of 2007, Zone A rents in Blackpool stand at £1000/sqm, which represents a significant decline since 1999 when they stood at £1,500/sqm. It is expected that following completion of the extension to the Hounds Hill Shopping Centre, Zone A rents in the primary shopping area will rise as new floorspace becomes available. Over the same period, Zone A rents in secondary frontages have remained static at £400/sqm.
- 8.13 The Focus website, which gives details of commercial property deals, provides further evidence of current rents achievable for shops in prime locations. It was recorded on 3 March 2008 that the clothing retailer Peacocks signed a ten year lease with Development Securities for 859 sqm of ground floor space in the former Pricebusters building on Bank Hey Street at an annual rent of £285,000. This equates to £332 per sqm.
- 8.14 In terms of major retail centres, Blackpool's closest geographical competitor is Preston, which is 19 miles away, and is in the process of upgrading its retail offer with a major new development anchored by John Lewis. Blackpool also faces strong competition from Manchester and the Trafford Centre. Although much smaller in size, the nearby Cleveleys town centre, which is becoming increasingly attractive to the major national multiple chains, remains very popular amongst local residents.
- 8.15 According to the Blackpool Retail Study, undertaken in 2004/2005, the level of retail expenditure leakage from the town is approximately 33% of comparison goods spending. Also,
-

convenience floorspace in the town centre is just 9%, compared with the national average of 17%, which is indicative of the lack of a large supermarket in the town centre. Policy SR3 addresses this deficit by identifying a major superstore as part of the Talbot Gateway redevelopment.

- 8.16 The largest out of town retail park in the local authority is Blackpool Retail Park, an 11,275 sqm site anchored by Morrisons, Currys and PC World. According to its Annual Monitoring Report 2006-2007, it is Blackpool Borough Council's intention to minimise out of centre retail development as part of its aim of re-establishing the town centre as the first choice shopping destination for Fylde Coast residents.

Office and Industrial Markets

- 8.17 The Fylde Coast in recent years has been characterised by low levels of business formation, with particularly low survival rates amongst small and medium sized businesses. Between 1994 and 2002, according to NOMIS data, the number of existing business de-registrations exceeded new business registrations, reducing business stock in the Blackpool area.
- 8.18 The Lancashire Structure Plan requires Blackpool to provide 40ha of employment land. Although this figure is a 20ha reduction from the last Structure Plan period, it is still more than double Blackpool's take-up of land over the last 10 years, which averaged 1.9ha per year. A total of 12.4 ha of land have been taken up for industrial land business development in the current plan period from April 2001 to 2006. In total, there remains

available a further 27.2 ha on sites allocated in the now adopted Blackpool Local Plan to meet the identified 40 ha Structure Plan requirement.

- 8.19 In light of the structure plan, the main requirements in terms of land allocation are:
- Large, accessible sites of high quality to attract new businesses and investment.
 - A network of accessible sites to serve the whole Borough.
 - Sites and premises to serve small and medium sized firms.
 - The development of office and commercial activities in and near the town centre to support its regeneration as a sub regional centre.
- 8.20 Blackpool Council has made extensive efforts to assemble quality new employment sites to overcome the town's historic disadvantage of a having a lack of large, well serviced sites and quality, modern, employment premises. The new employment land principally comprises the Blackpool Business Park in the south of the Borough and the Blackpool Technology Park to the north. Both provide large, quality sites and easy access to the motorway and trunk road network.
- 8.21 Table 24 provides information relating to the level of take-up of available business land from 1997-2009. As no Annual Monitoring Report was undertaken in 2008, the 2009 report

takes account for the land take-up during this period. The take-up figure for 2006-09 is the largest in the last 5 years due to the new land made available at the Blackpool Business Park.

Table 24: Take-up of Available Business Land in Blackpool 2002-2007

Monitoring Year	Take-up (Hectares)
2002-2003	2.2
2003-2004	2.4
2004-2005	1.7
2005-2006	1.9
2006-2007	3.94
2007- 2009 (2 Year period)	6.7
Average 2002-2007	2.26

(Source: Blackpool Council Annual Monitoring Reports)

- 8.22 The 2009 Annual Monitoring Report is currently being finalised and so additional figures regarding industrial land and premises are unavailable. However, the 2007 Annual Monitoring Report details 72,291 sqm of vacant business/industrial floorspace totalling 132 properties in the Blackpool Borough, as advertised in Property Finder. This excludes new speculative developments awaiting their first occupants. Whilst there is a substantial amount of existing industrial floorspace available, over time there is evidence of investment and continued change on the main allocated employment estates.
- 8.23 Blackpool is not currently seen as an important market for offices, as evidenced by the lack of statistical data published on the town in this sector. In the period 2006-2007, just 3,763 sqm of office space was

completed in 3 locations, all on out of town sites. There were also no new applications for B1a use in the town centre. However, the number of employees in major town centre offices was reported to increase from 570 to 642 from 2005/6 to 2006/7. It is a target of Blackpool Borough Council to double major office employment by 2012. New prime office space for public and private sector use is an important component of the Talbot Gateway redevelopment.

North Beach

- 8.24 Commercial activity in North Beach is dominated by hotels, guest houses and other holiday accommodation, which provide a substantial amount of employment available in the study area. In terms of retail, there is a parade of shops on Dickson Road to the south of the study area. These are predominantly occupied by fast food takeaways, with other premises occupied by local independent retailers, including convenience stores/newsagents, an urban/hip hop fashion store, a bookmaker's, a tattoo parlour and several hairdressing salons. On General Street is Lefton's, a large furniture showroom, while another prominent retailer is Springfield Market, on the corner of Springfield Road and the Promenade. Industrial activity includes a well established auto repair garage and a self storage facility, while offices are generally confined to low quality spaces above retail premises.

8.25 Research into properties currently on the market was conducted to gain an insight into the commercial market conditions within the North Beach area, in addition to interviews with specialist commercial agents.

8.26 A survey of Blackpool commercial agency websites revealed that in March 2009 there were a number of properties available. As Table 25 implies, most commercial properties available are hotels and other holiday accommodation.

Table 25: Selection of Commercial Properties in North Beach on the Market in March 2009

Location	Property Type	Additional Information	Asking Price
Pleasant Street	Hotel	16 bedroom	£149,950
Dickson Road	Hotel	10 bedroom (above shop)	£179,950
Springfield Road	Hotel	9 bedroom	£199,950
Dickson Road	Hotel	11 bedroom (3 star)	£265,000
Lord Street	Hotel	23 bedroom	£365,000
Lord Street	Holiday Flats	10 flats	£415,000
Dickson Road	Hotel	29 bedroom (3 diamond)	£495,000

(Sources: Kays Commercial and Kenrick and Co, Rightmove websites)

8.27 In line with much of the commercial property market in Blackpool, conditions in North Beach were described as 'slow' by local agents. As Table 22 implies, most commercial properties available are hotels and other holiday accommodation. The general consensus among local agents was that in terms of holiday premises, North Beach is not highly sought after compared with other areas of Inner Blackpool. More popular

locations were stated as being Albert Road, Coronation Street and Vance Road, near the extension of the Hounds Hill Shopping Centre. Hotels in North Beach were viewed as harder to sell due in part to the poor condition of surrounding properties, and also the reputation of the area.

8.28 This view is exemplified by the example of the Shadowlands Hotel, a 66 bedroom establishment in a prominent location on Pleasant Street. Having been unsuccessfully marketed as both a freehold and leasehold hotel, it was advertised in September 2008 as having development potential for 20 two bedroom apartments following a successful planning application to Blackpool Council in March 2008. It was the view of one agent interviewed that the area has greater potential as a residential area than for hotels.

8.29 However, there is one exception to the decline in popularity of hotels in the area. According to several agents, the areas around Lord Street, High Street and Springfield Road have become very popular among the gay and lesbian community. This is evidenced by the proliferation of hotels run for gay and lesbian tourists. While this has had the effect of adding vibrancy to this part of North Beach, the reputation it has given to the area appears to have had the effect of discouraging hoteliers catering for other markets. This is despite the presence of the gay and lesbian community being credited as contributing to the recent

improved streetscape appearance of Lord Street and High Street in particular.

Tourism

Introduction

The economy of North Beach as a mixed use resort neighbourhood is heavily dependant directly and indirectly on tourism. The overall decline of Blackpools tourism over recent years, and in particular the reduction in the number of visitor's ahs had significant impact upon North Beach and its existing businesses.

North Beach remains one of the key concentrations for holiday accommodation within Inner Blackpool. Rapid changes are ongoing within this sector in particular which present both challenges and opportunities for the long term sustainable regeneration of the area.

Holiday Accommodation – A Sector in Decline

- 8.30 In July 2007 Blackpool Council completed an internal report on holiday accommodation trends in the town. The study reviewed and updated an earlier study completed by CURS in 2001.
- 8.31 The key findings of relevance to the study are outlined below.

- There were 1858 holiday accommodation businesses in operation in Blackpool. In 2007.
- The vast majority of holiday accommodation were found in Bloomfield, Talbot, Claremont (the ward in which the North Beach Study area lies), Waterloo and Warbreck wards.
- A total of 454 businesses have been lost from the holiday accommodation stock since 2000, amounting to a 19.6% decline across the borough.
- 95% of losses have been through conversion to residential use, predominantly without planning permission—indicatively around 350 properties.
- Many holiday accommodation businesses are struggling to survive on minimal income but not closing down and many places are converting from holiday use to residential (HMO) use but have not applied for planning permission to do this and have fallen beneath the Council's radar (especially as they often retain the appearance of a hotel).
- Where residents claim Housing Benefits, it is indicative of residential use. The study found that there was a concentration in Claremont (the ward in which the North Beach Study area lies), north of the town centre, within the North Beach study area.
- There is a strong centralisation of holiday accommodation towards the resilient core of the Town Centre, where there were the lowest relative losses, and also the South Shore and Promenade areas, which have historically been principal hubs of the industry. The more peripheral areas beyond the inner areas (including within the North Beach study area), are less able to compete, potentially in part due to the shift towards last-minute passing trade vis-à-vis researched advanced booking, and/or greater ability to diversify into other uses.

- However, the highest annual occupancy was reported in holiday accommodation along North Promenade, also reporting an average occupancy of 82% in the Illuminations period. This is likely to be due to the predominance of higher quality rated, larger hotels.

8.32 Subsequent data collection and analysis was completed by Blackpool Council in January 2009 which looked to update the Holiday Accommodation survey database started in 2007.

8.33 Table 26 indicates the total number of holiday accommodation properties on the market across Inner Blackpool over the 8 Quarters running from July 2007 until January 2008. As this indicates, the number of holiday accommodation properties on the market across Inner Blackpool since 2007 has increased by over 50%, from 294 to over 450. The actual number of properties for sale within Inner Blackpool is likely to be higher as properties are continually entering and leaving the market.

Table 26: Total Number of Holiday Accommodation Properties on the Market Each Quarter

Quarter Number	Quarter	Total
1	April '07	294
2	July '07	305
3	October '07	315
4	January '08	317
5	April '08 (Missed)	-
6	July '08	366
7	October '08	373
8	January '09	452
Count Change (Q1-8)		158
Change (%) (Q1-8)		53.74%

8.34 Table 27 outlines the total number of holiday accommodation properties on the market at each quarter, over the eight quarters from July 2007 up until January 2009, illustrated by each neighbourhood resort cluster. As this indicates, North Beach has had a comparatively lower number of properties on the market than some of the other areas within Inner Blackpool, such as Palatine and The Village. This is likely to be due to the fact that many of the hotels within North Beach are larger, grander hotels than elsewhere in Blackpool and have in the past remained fairly sustainable businesses. However, as Table 27 indicates, the number of properties on the market in North Beach has increased since Quarter 6 (July 2008) and has actually increased comparatively more over the 8 quarters.

Table 27: Total Number of Holiday Accommodation Properties on the Market Each Quarter by Resort Neighbourhood Cluster

Q	Quarter	Resort Neighbourhood/Cluster						
		Gynn	North Beach	Palatine	Foxhall	The Village	South Beach	Unnamed
1	April '07	31	27	72	18	47	29	6
2	July '07	28	21	79	18	53	31	9
3	October '07	28	19	88	15	62	29	7
4	January '08	29	16	86	15	61	29	7
5	April '08 (Missed)	-	-	-	-	-	-	-
6	July '08	25	22	97	17	65	41	8
7	October '08	29	33	98	17	63	36	10
8	January '09	34	47	123	25	73	46	8
Count Change (Q1-8)		3	20	51	7	26	17	2
Change (%) (Q1-8)		9.68%	74.07%	70.83%	38.89%	55.32%	58.62%	33.33%

8.35 Figure 49 indicates the percentage share of all holiday accommodation on the market for each quarter by resort neighbourhood. Although many areas have a higher proportion of properties on the market, North Beach's proportion has increased over the last 3 quarters. In fact, the proportion of holiday properties on the market within North Beach has increased by nearly 14% from Q1 to Q8, the second highest of all other resort areas, as highlighted in Table 28.

Figure 49: Percentage Share of Holiday Accommodation Properties on the Market Each Quarter by Resort Neighbourhood/Cluster

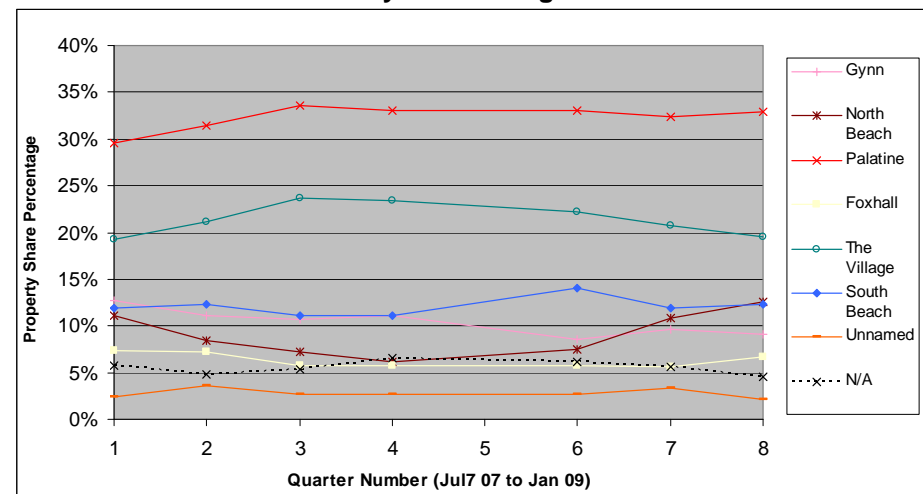


Table 28: % change in share of Holiday Accommodation on the Market Q1 – 8

Resort Neighbourhood/Cluster	Change (%) (Q1-8)
Gynn	-
North Beach	13.87%
Palatine	11.75%
Foxhall	-9.15%
The Village	1.60%
South Beach	3.76%
Unnamed	-
	12.78%
N/A	-
	20.57%
Total	52.87%

8.36 The Table in Appendix 4 outlines a list of hotels and holiday flats in North Beach that are either currently on the market or that have been previously. It tracks the marketing/asking prices of these properties throughout the course of the Holiday Accommodation Survey (between July 2007 and January 2009).

8.37 The information presented in this table highlights that the majority of holiday accommodation had been on the market for several months/years. A number of properties (highlighted in yellow) had been reduced in the time period they had been on the market, though usually by only £10-20,000.

8.38 As all this information suggests, there is a growing number of holiday accommodation properties on the market in North Beach and the rate at which properties are being marketed is increasing at a comparatively quicker pace than many other areas across Inner Blackpool. Therefore, it is important that any strategy or intervention seeks to tackle the increasing decline in the holiday accommodation sector.

Visitor Accommodation Study (2009)

8.39 Blackpool, Fylde and Wyre Councils commissioned Humberts Leisure to undertake a detailed report on visitor accommodation in the Fylde Cost sub-region in 2008.

8.40 The draft report (2009) highlighted the following

The quantum of Blackpool's accommodation that remains in genuine holiday use has been in decline for 40 years. Earlier decline focused on smaller scale premises in peripheral areas, but now decline is increasingly affecting all sizes of properties and having a wide impact throughout the holiday areas.

- Statistics show:

CURS Study (2001)	2,342 premises
BC review (2007)	1,858 premises (-20.6%)
Humberts Leisure (2008)	1,770 Blackpool premises (-24%).

The 24% decline in premises (2001-8) is matched by a lesser decline of 14% in bedspaces (from 69,725 to 59,933).

There is a major contrast between the decline of 179 serviced premises (10%) and the 395 decline in non-serviced holiday flat premises (78%).

The ongoing MIPS assessment is finding further levels of decline including significant numbers of hotel and guest house premises no longer trading and converting to single residential use.

There is no recent comprehensive or accurate data on occupancy rates, despite reported figures around 20%. A 2007 occupancy survey showed annual average occupancy of 46%, but had a very low and limited response.

While average occupancy may be higher, the key issue is that it remains evident there are large numbers of premises at the bottom end of the market with occupancy levels around or below 20%, which cannot be sustained in future.

- Visit Britain occupancy data shows national occupancy levels around 50% for guest houses and 44% for B&Bs.
- Current data shows Blackpool's visitor numbers have declined from 17 million in 1987 down 20% to 13.6 million in 2006. Average length of stay has fallen, and visitor nights have declined by 40%, double the decline in numbers of visitors.
- There is no 2008 visitor data, but available evidence is decline has continued.
- To achieve average occupancy in line with the average of British hotel and guest house occupancy, the HL 2008 Study estimates that Blackpool, (based on their medium scenario of current Blackpool occupancy) needs to shed around 18,000 bedspaces – approx 500 establishments.
- The assessment is that this 18,000 excess capacity comprises:

hotels < 10 rooms	(3,700 – 7,400 bedspaces)
hotels 10-29 rooms	(8,300 – 13,400 bedspaces)
hotels > 30 bedrooms	(1,600 – 2,200 bedspaces)
- HL estimate the impact of a small future increase in staying visitors as Blackpool's regeneration takes effect would reduce excess capacity to

around 14,000 bedspaces and 400 premises, focused on smaller properties.

Future Visitor numbers

- Past work has looked at alternative future scenarios of decline, status quo, or an upward trend in the numbers of visitors – but in 2009 there is no replacement catalyst for the casino to improve visitor numbers, and no evidence the bottom has been reached. The current recession will further reduce holiday spending, but this maybe compensated by a domestic holiday boost from the decline in the pound.
- However, in planning ahead to 2026, the new Core Strategy will be setting out the way forward in the context of an overall strategy and positive vision of regeneration and growth, including the review of the ReBlackpool Masterplan to drive forward change.
- This supports the HL assumption that resort accommodation policies should plan to at least retain or clawback the current level of visitor numbers.

Future Numbers of holiday premises

The HL Study indicates an excess supply of 14,000 bedspaces, which equates to the need for a loss of a further 400 premises.

- In 2008 the assessment was that there were still 1650 'surviving' premises, with many struggling on the margin or about to go under. Properties on the edge of viability do not have the money to invest and upgrade, and there are no quick fix easy ways out.

8.41 The findings of this report will inevitably influence future policy regarding hotel/holiday accommodation across Blackpool, and will therefore impact on the future direction for North Beach.

Tackling Decline

8.42 The Blackpool Holiday Accommodation Report (2007) makes a number of recommendations to tackle the decline in the holiday accommodation sector as illustrated in Figure 50.

Figure 50: Recommendations for Tackling Decline

A) Attract more visitors to the town

B) Increase tariffs by improving quality and reducing price competition

Through encouraging further uptake of accreditation and enforcing standards, the Council could promote increased quality of the sector, which currently is sub-par in too many of the accommodation units.

Many businesses are struggling to remain viable. Competition has driven prices down to as low as £10 per night and thus makes it incredibly difficult to earn a viable income, as the profit margin on each guest is small.

C) Reduction in the number of holiday accommodation units

To increase occupancy, a significant proportion of the holiday accommodation sector has to be removed from use, reducing competition and dividing the diminished number of visitors and visitor spend amongst fewer businesses. This should (encouraged by potential accreditation and enforcement schemes) should lead to improvement to the quality and profitability of remaining business and encourage greater levels of maintenance to be carried out. Any strategy to reduce this stock will need to consider how to avoid adding to the already large numbers of HMO accommodation, coupled with plans to aid repair of the properties that remain and increase uptake of accreditation.

D) Targeting Reduction in Holiday Accommodation

The report recommends focussing intervention strategies on those businesses that are most at risk. These businesses include those in backstreet locations off the beaten track which have been allowed to become run-down and have little scope in their built fabric for significant modernisation anyway, and are crammed into streets with many competitors and no car parking space or green space.

Key Evidence Sources

- Experian
- ONS data
- Focus property database
- Property agents websites
- *Blackpool Council Annual Monitoring Report*
- Visitor Accommodation in the Fylde Cost sub-region in 2008. Humberts Leisure/Blackpool Council (Draft March 2009)
- Holiday Accommodation survey database
- Holiday Accommodation Study (Blackpool Council, 2007)