



Pier Review

Sustainability Toolkit for British Seaside Piers

Blackpool Council



BU
Bournemouth
University

Pier Review: Sustainability toolkit for British seaside piers 2020

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Executive Summary	5
1. Introduction	8
2. History and development of British seaside pleasure piers	9
3. Contemporary British seaside resorts and their piers	13
4. Pier review: review of seaside pleasure piers in 2020	16
4.1 Headline figures	17
4.2 Pier categories	17
1) Waiting for the tide to turn.....	17
2) Rising from the waves.....	17
3) Seaside Special: Reflecting seaside entertainments and pastimes.....	18
4) Heritage piers: Encapsulating the heritage of the British Seaside	20
5) 21st Century Innovators: Adapting to contemporary consumer demands	22
4.3 Pier Review: Analysis and evaluation of British seaside piers	24
5. Pier pressure: challenges faced by seaside pleasure piers	35
5.1 Pier design:	35
5.2 Pier risks:	38
5.3 Pier costs:	40
6. Best practice piers: the top ten seaside pleasure piers	45
6.1 Bournemouth Pier: Unique adventure sports attractions	46
6.2 Brighton Palace Pier: The most visited pier in the UK	48
6.3 Clacton Pier: The all-weather pier	50
6.4 Cromer Pier: The finest seaside pier theatre entertainment	52
6.5 Felixstowe Pier: Successful product and market diversification	54
6.6 Herne Bay Pier: A vibrant pier operated by a charitable trust	56
6.7 Mumbles Pier: The most experienced pier operators in the UK	58
6.8 Skegness Pier: Continuously updating product offering	60
6.9 Southend Pier: The longest pleasure pier in the world	62
6.10 Swanage Pier: Securing funding for a sustainable future	64
7. Pier sustainability toolkit	66
Pier Sustainability Toolkit: Seaside Special Piers	67
Pier Sustainability Toolkit: 21st Century Innovator Piers	68
Pier Sustainability Toolkit: Heritage Piers	69
8. Conclusions: Sustainable seaside pleasure piers	70
8.1 Recommendations	70

Executive Summary

Pier Review 2020: Headline Figures

Pier ownership: 54% of piers operate within the commercial sector, 31% are local-authority owned and operated, 7% are owned and operated by third-sector organisations, and the remaining 8% operate through a partnership between public and third sector organisations.

Current status: the vast majority of piers – 75% - are open and in good or satisfactory state of repair. A further 17% of piers are in need of maintenance/refurbishment work or are currently undertaking repairs. This leaves 8% of piers (5 in total) currently closed to the public, with two piers (Southampton Royal and Weston Birnbeck Piers) at imminent risk of being lost.

Listed status: almost half of all British seaside pleasure piers – 49% - are not afforded listed status because many of these piers have been significantly redeveloped or have lost sections of their original structures. However, Blackpool South and Central Piers appear to be notable exceptions to having listed status. 38% of seaside piers are Grade II (or equivalent) listed as structures of special interest, with a further 11% being Grade II* (important structures of more than special interest). This leaves less than 2% of seaside piers – only Clevedon Pier – as Grade I listed (structures of exceptional interest).

Pier Review 2020: Pier Categories

Waiting For The Tide To Turn: Closed and derelict piers that are at risk of being lost. Piers in this category may have support for regeneration but face numerous barriers. There are currently two piers in this category: Weston Birnbeck Pier and Southampton Royal Pier.



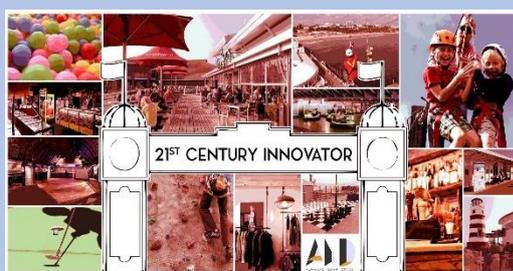
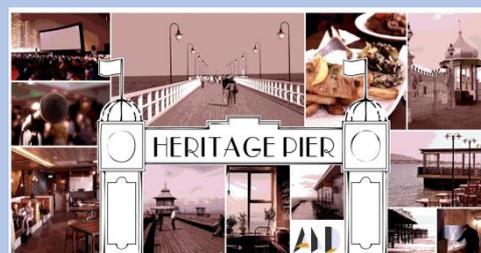
Rising From the Waves: These piers are currently closed, but have established redevelopment/rebuilding plans underway, with significant community support. There are currently three piers in this category: Ramsey Queen's, Totland Bay, and Colwyn Bay Pier.

Seaside Special: The key target market is families. These piers have a mass appeal to visitors, and are used by the local community for special events, fishing, or out-of-season strolls. 25 piers are classified as Seaside Special piers. 80% of the piers in this category are in commercial ownership. The remaining 20% of Seaside Special piers are in public sector ownership, with attractions and facilities leased to commercial tenants.



Pier Review 2020: Pier Categories

Heritage Piers: The key target market is the mature family market and those aged 50+. Heritage piers are valued by their local communities who view them as a key leisure/recreation facility, and are well-loved by visitors who enjoy the nostalgia of a visit to a heritage pier. There are 19 piers along the British coast classified as Heritage piers, the majority are in public or third-sector ownership.



21st Century Innovators: Key markets are families with older children & the 18-35 age group. 21st Century Innovator piers offer all-weather attractions for visitors & are utilised by local communities out-of-season. 12 piers currently operate within this category. 67% operate within the commercial sector, with a further 25% operating through partnerships with commercial or third sector organisations.

Pier Challenges

Pier Design: For seaside piers to be commercially successful they need to be: relatively short; have a wide deck; have a substructure design capable of carrying the load of top-deck structures; have the area capacity for significant structures housing attractions and facilities at the entrance to the pier.

Fire: the majority of pier infrastructure from the deck upwards is made of flammable materials. Pier fires are difficult to tackle due to access issues and can spread quickly.

Storms and tidal surges: Since 2013 ten of the UK's seaside piers have suffered significant damage from the impact of storm surges. Research currently predicts a sea level rise of between 25cm to 2.5 metres around the UK coast during 21st century, alongside increasingly frequent storm surge events, which will result in "a severe impact on UK coasts by 2080".

Pier maintenance: Repair and upkeep of pier substructures, decking, and buildings is an ongoing task that can cost owners between £250,000 to £2,000,000 per annum depending on the size, location, and usage of the pier.

Pier insurance: Findings indicate that pier owners encounter difficulty in insuring their piers, especially after major pier fires at Weston, Hastings and Eastbourne piers which saw the price of insurance premiums significantly increase. In addition, many insurers withdrew from insuring pier structures, leaving relatively few companies in the market and further reducing competitive pricing for pier insurance.

Funding and grants: External funding and grants for pier restoration is predominantly restricted to public and third sector/charity owners. Piers in commercial ownership are

without access to such funds. Therefore, if commercial piers require significant maintenance or repair this has to be self-financed.

Best Practice Piers

Ten piers from different sectors were identified as examples of best practice in sustainable pier operations.



Drawing from the best practice piers and the full review of all UK seaside pleasure piers, 3 toolkits were developed to enhance pier sustainability.

Recommendations from the report findings indicated that owners and operators should: have a clear strategic direction for their piers; engage in scenario and business continuity planning to mitigate the impacts of future crises; secure long-term partnerships between owners and operators; and continuously monitor and evaluate their operations and organisations. Further support, resources and assistance to ensure pier sustainability is needed regarding: external funding opportunities; reduction in pier insurance premiums; technological and engineering developments in pier building, repair and maintenance; and future uses for piers for visitors and residents of coastal resorts.

I. Introduction

Pier Review: Sustainability toolkit for British seaside piers was commissioned by Blackpool Council and funded by the Ministry for Housing, Communities and Local Government's Coastal Revival Fund. The main objectives of this document are:

- To understand best practice in British seaside pier operations
- To develop a toolkit for the economic and structural sustainability of seaside pleasure piers

The Pier Review document provides a brief history of the development of seaside piers and outlines the contemporary importance of these structures to the British coast. A comprehensive review of all 61 British seaside pleasure piers is undertaken to analyse ownership models, the current status of each pier, and the piers' current strengths and weaknesses.

From the review, a number of pier categories were developed, with each type of pier having their own strengths and opportunities alongside a unique set of challenges. There are three main categories of pleasure pier: The Seaside Special pier which offers relatively traditional forms of entertainment; the 21st Century Innovator Pier which is adapting and developing its product offer for new markets; and the Heritage Pier which focus on maintaining the traditional roles and ambience of the pier.

Key issues and challenges of pier ownership and operation are considered, before highlighting ten best practice piers which were identified from the pier review database. In-depth interviews were conducted between 24th March and 13th May 2019 with pier owners and operators to identify key indicators of successful and sustainable pier operation. The ten best practice piers are drawn from a range of sectors and pier categories.

The development of the pier sustainability toolkits is based on the pier review database and best practice pier operations to provide a sustainability road map for piers within the three different categories. Recommendations are presented to ensure the future sustainability of seaside pleasure piers in the report's conclusion.

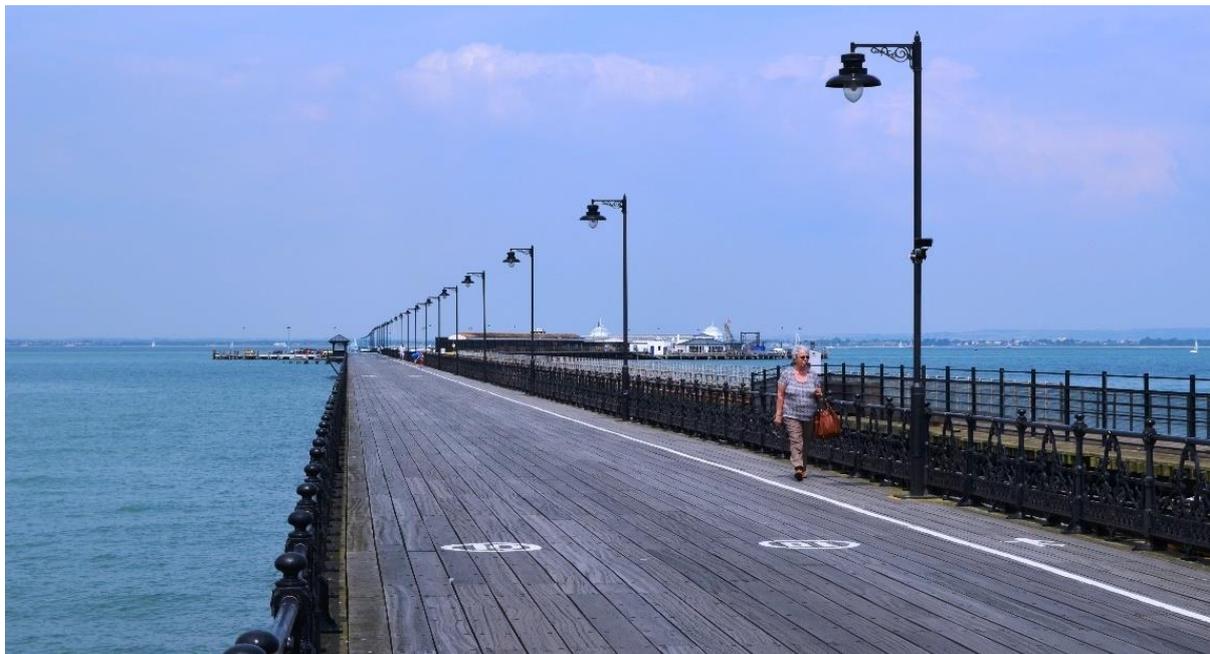
2. History and development of British seaside pleasure piers

The history and development of British seaside resorts is well documented, and it's generally accepted that the first resorts developed from earlier spa resorts. Indeed, in England there are two resorts that vie for the title of 'Britain's first seaside resort': Margate and Scarborough. Both Margate and Scarborough began to develop as 'sea bathing' resorts from around the middle of the 18th century. Of course, in the 1750s those travelling to the new resorts would have had only two possible means of transport: horse-drawn carriage/stagecoach, or via sea on boats.

The latter form of transportation presented a problem for visitors wanting to get ashore at the resorts, and so landing stages and jetties were built in order to accommodate the passengers arriving by steamer. The jetties and landing stages of the 18th century were plain structures, usually built of stone or wood, but as the resorts became more established there is some evidence that these structures were used by visitors for promenading.

The National Piers Society distinguishes pleasure piers from landing stages and jetties on the basis of three criteria. They define pleasure piers as: 1) having facilities for entertainment or pleasure/leisure; 2) as being accessible to the public (even if the pier is currently closed); and 3) the structure must be standing in saltwater (which can include river estuaries and salt-water lochs).

Therefore, the first 'true' pleasure pier to be constructed at a British seaside resort is classed as Ryde Pier on the Isle of Wight, which opened in 1814. This was swiftly followed by several other 'promenading piers', including the 1823 Brighton Chain Pier, which provided a wide, flat walkway for visitors to promenade on for a relatively high entrance fee, ensuring that the piers of this time were only for a certain class of visitor.



Ryde Pier pictured in 2014, on its 200th anniversary. The pier now features a walkway, disused tramway, and Island Line railway line to the pier head. (Source: Anya Chapman)

2. HISTORY AND DEVELOPMENT OF BRITISH SEASIDE PLEASURE PIERS

The period between 1860 and 1904 is considered to be the golden age of British seaside pleasure pier building. The railways had arrived at many British seaside resorts by the 1850s, meaning that the purpose of the pier had changed from being a transportation hub to a venue for pleasure and entertainment. By the 1860s piers had become tourist attractions, and the growing resorts around the British coast wanted to boast of their own promenading pier – the attraction where, for a small fee, visitors could ‘walk over the waves’. Southport Pier, opened in 1860, is considered to be the first cast iron pleasure pier, albeit its leisure facilities were added at a later date. At the time steamers were still calling at the resorts, and so Southport’s Pier, in order to reach the sea and act as an effective landing stage, stretched out for almost a mile.

As the 1870s dawned, piers began to develop their attractions and facilities further. Many piers were adapted and reengineered to include reading rooms, bandstands, pavilions and kiosks. The first purpose-built pleasure pier is Hastings Pier, which opened in 1872 with a pavilion at the pier head. By 1899 almost 100 pleasure piers existed around the British coast, with possibly the most ornate, Brighton Palace Pier, opening that year. Palace Pier featured a theatre and three pavilions – one for smoking, one for reading, and one for dining – the pleasure pier had well and truly arrived.



An early picture of Brighton Palace Pier featuring the theatre and ornate ornamental arches (Source: Timothy Phillips)

The last pleasure pier of the golden era of British seaside pier-building to be opened was Weston-Super-Mare’s Grand Pier. The Grand Pier has always reflected the popular tastes of the British seaside resort visitors, and when the pier opened in 1904 it featured a 2000-seat theatre for shows including opera, music hall, and boxing. Seaside piers were no longer the preserves of the elite and now catered for the mass tourist market.

2. HISTORY AND DEVELOPMENT OF BRITISH SEASIDE PLEASURE PIERS

Chronological List of British Seaside Pleasure Piers	
Ryde Pier 1814 – present	Bournemouth Pier 1880 - present
Leith Trinity Chain 1821-1898	Hornsea Pier 1880 - 1897
Brighton Chain 1823-1896	Totland Bay Pier 1880 - present
Walton-on-the-Naze 1830-1880	Hythe Pier 1881 - present
Southampton Royal 1833 – present	Ramsgate Marina 1881 - 1930
Gravesend Town 1834 – present	Seaview Chain Pier 1881 - 1952
Sheerness Pier 1835 – 1971	Skegness Pier 1881 - present
Beumaris Pier 1846-present	Plymouth Hoe 1884 - 1953
Lowestoft South Pier 1846 – present	Rothesay 1884 - present
Great Yarmouth Wellington 1853 – present	St Anne’s Pier 1885 - present
Harwich Ha’penny 1853-present	Ramsey Queens Pier 1886 - present
Margate Jetty 1855 – 1978	Alum Bay 1887 - 1958
Southport Pier 1860 – present	Folkestone Victoria 1888 - 1954
Southsea Clarence Pier 1861 – present	Lee-on-Solent 1888 - 1958
Worthing Pier 1862 – present	Southbourne Pier 1888 - 1909
Blackpool North Pier 1863 – present	Boscombe Pier 1889 - present
Ryde Victoria Pier 1864 – 1924	Shanklin Pier 1890 - 1993
Aberystwyth Royal Pier 1865 – present	Southend Pier 1890 - present
Bognor Regis Pier 1865 – present	St Leonard’s Palace 1891 - 1951
Lytham Pier 1865 – 1960	Blackpool South 1893 - present
Brighton West Pier 1866 – 2016	Dover Promenade 1893 - 1927
Cowes Royal Pier 1867-1882	Fort William 1894 – present****
New Brighton Pier 1867- 1977	Torquay Princess 1894 - present
Rhyl Pier 1867 – 1973	Dunoon Pier 1895 - present
Teignmouth Grand Pier 1867 – present	Penarth Pier 1895 - present
Weston Birnbeck Pier 1867 – present	Rhos-on-Sea 1895 -1954
Blackpool Central Pier 1868 - present	Bangor Garth 1896 - present
Clevedon Pier 1869 -present	Morecambe West End 1896 - 1978
Douglas Pier 1869 - 1894	Swanage Pier 1896 - present
Morecambe Central 1869 - 1992	Aberavon Pier 1898 - 1964
Scarborough North 1869 - 1914	Mumbles Pier 1898 - present
Saltburn Pier 1869 - present	Herne Bay Pier 1899 - present
Walton-on-the-Naze 1869-present	Brighton Palace 1899 - present
Eastbourne Pier 1870 - present	Tenby Royal Victoria 1899 - 1953
Hunstanton Pier 1870 - 1978	Southwold Pier 1900 - present
Clacton Pier 1871 - present	Colwyn Bay Pier 1901 – present*
Portobello 1871 - 1917	Cromer Pier 1901 - present
Westward Ho! Pier 1871 - 1880	Great Yarmouth Britannia 1901 - present
Hastings Pier 1872 - present	Minehead Pier 1901 - 1940
Cleethorpes Pier 1873 - present	Cowes Victoria 1902 - 1961
Redcar Pier 1873 - 1981	Lowestoft Claremont 1903 - present
Ventnor Pier 1873 - 1993	Sunderland Roker 1903 – present***
Coatham Pier 1875 - 1899	Weston Grand Pier 1904 - present
Yarmouth Pier 1876 - present	Folkestone Harbour Arm 1904 – present**
Llandudno Pier 1877 - present	Falmouth Prince of Wales 1905 - present
Withernsea Pier 1877 - 1903	Felixstowe Pier 1905 - present
Aldeburgh 1878 - 1909	Fleetwood Victoria 1910 - 2008
Paignton Pier 1879 - present	Burnham-on-Sea 1911 - present
Pegwell Bay 1879 - 1885	Weymouth Commercial 1933 - present
Sandown Culver Pier 1879 - present	Weymouth Bandstand 1939 - present
Southsea South Parade 1879 - present	Deal Pier 1957 - present

*Colwyn Bay Pier is currently awaiting rebuilding. **Folkestone Harbour Arm was reclassified as a pleasure pier in 2016. ***Sunderland Roker Pier was reclassified in 2018. ****Fort William Pier was reclassified in 2018. Piers in bold are those surviving in 2020.

As shown in the table on the previous page, there were only 7 pleasure piers built after 1904. During World War II many piers were sectioned (a section was cut out of the pier to stop enemy troops landing at the pier head), and although many piers were rebuilt after the war, many fell into disrepair and were later demolished.

By the late 1960s and 1970s British seaside resorts faced increased competition as holiday destinations from overseas package holidays and other UK destinations such as national parks and historic cities. As British seaside resorts declined as long-stay holiday destinations their piers suffered from lack of investment and were demolished, became derelict, or were destroyed by storms or fire. As pleasure piers and the resorts in which they were located lost their holiday markets, piers lost their importance. They were no longer viewed as the latest attraction, and as their maintenance costs increased with age, many resorts no longer valued their piers. This was illustrated in the demolition of Shanklin Pier in 1993, which was viewed with relief by the resort as the decaying structure was an eyesore on the seafront. The most recent piers to be lost were Fleetwood and Brighton West, which succumbed to fires and storms. Today, 61 seaside pleasure piers remain in the UK.

3. Contemporary British seaside resorts and their piers

Beatty *et al*¹ found that “far from being in terminal decline as a result of the rise of foreign holidays, a substantial British seaside tourist industry remains alive and well and seems even to have been growing over the last decade”. Seaside pleasure piers have mirrored this trend, with the number of piers increasing over the last 20 years from 58 to 61. While no new piers have been built during this period, pier structures have been redeveloped and repurposed for leisure and pleasure purposes, with a number of other coastal locations currently campaigning for the re/building of their seaside piers.

The Redevelopment of Seaside Piers

Repurposed piers	Planned pier developments
Folkstone Harbour Arm: reopened in 2016 as a pleasure pier featuring restaurants, bars, retail, and events spaces.	Colwyn Bay Victoria Pier: dismantled after storm damage, there are now plans to develop a new pier, the first stage of which will begin construction in 2020.
Sunderland Roker Pier: reopened in 2018 as part of the wider redevelopment of the seafront. Features restaurant and guided tours of the pier’s tunnel and lighthouse.	Shotley Pier: A former railway pier, the Shotley Heritage Charitable Community Benefit Society have recently purchased the pier and are currently seeking planning permission for redevelopment as a pleasure pier.
Fort William Pier: reclassified in 2018 as the former ferry pier now features a seafood restaurant.	Withernsea Pier: demolished in 1903, the Withernsea Pier and Promenade Association have plans to rebuild the pier and are currently undertaking the refurbishment of the pier towers.
Dover Marina Pier: part of the Western Docks Revival, a new promenade pier opened in May 2019.	Helensburgh Pier: Helensburgh Seafront Development Project currently campaigning and fundraising to turn this former jetty into a pleasure pier.
	Hunstanton Pier: demolished in 1978, the Hunstanton Heritage Pier Community Trust are undertaking a feasibility study to rebuild the pier.
	Ramsey Queen’s Pier: Closed since 1991, Queen’s Pier Restoration Trust currently undertaking significant structural repairs with plans to reopen the pier in phases.
	Totland Bay Pier: Pier deck has been closed since 1980. Totland Pier Ltd is rebuilding the pier with plans to reopen in 2020.

In addition to the above redevelopments, a number of formerly closed and derelict seaside pleasure piers have reopened during the last decade, including Southsea South Parade Pier, Hastings Pier, and Cleethorpes Pier.

Recent figures published by Visit Britain² show that in 2017 British seaside resorts accounted for 26% of all domestic tourism overnight trips (a total of 28.15 million visits), and 9% of the domestic day visit market (159 million visits). In addition, National Coastal

1. Beatty, C., Fothergill, S., Gore, T., & Wilson, I. (2010), *The seaside tourist industry in England and Wales*, CRESR, Sheffield Hallam University
2. Visit Britain (2018), *The GB Tourist 2017 Annual Report*, and *The Great Britain Day Visitor 2017 Annual Report*, available at <https://www.visitbritain.org/official-statistics>

3. CONTEMPORARY BRITISH SEASIDE RESORTS AND THEIR PIERS

Tourism Academy³ (NCTA) figures show that in 2016 international tourism to the British coast totalled approximately 1.8 million visitors, equating to 15% of the international inbound tourism market. The NCTA estimate that seaside tourism is valued at approximately £8 billion to the UK economy.

Seaside pleasure piers play an important role in the visitor economy at British seaside resorts. Survey results⁴ undertaken as part of this study showed that 88% of respondents agreed that seaside towns should have a pleasure pier, and 92.4% thought that piers add to the atmosphere of seaside resorts. Pleasure piers have been recognised as flagship attractions and a recent report published by House of Lords Select Committee on Regenerating Seaside Towns and Communities⁵ described piers as ‘unique assets’ in seaside resorts.

The majority of seaside pleasure piers do not monitor their visitor numbers. As most piers are free to access, it is difficult to effectively count footfall to these attractions, but a limited number of piers do publish these figures.

Visitor numbers to seaside piers

Pier	Approximate visitor numbers
Brighton Palace Pier	4,684,000 (2017)
Southwold Pier	1,000,000 (2015)
Clacton Pier	930,000 (2019)
Paignton Pier	400,000 (2008)
Bournemouth Pier	Paying visitors 380,000 (2009)
Southend Pier	Paying visitors 367,142 (2018)
Swanage Pier	125,000 (2018 estimated)
Clevedon Pier	Paying visitors 89,000 (2016)
Bangor Garth Pier	Paying visitors 40,000 (2018 estimated)
Harwich Ha'penny Pier visitor centre	7,645 (2008)

From the above figures it is difficult to make generalisations on visitor numbers to seaside pleasure piers. It should be noted that piers that charge an entrance fee generally have fewer visitors than free-to-access piers. Without effective monitoring of visitor numbers to seaside pleasure piers it is difficult to ascertain the significance of these structures as visitor attractions. Nevertheless, the value of piers to seaside resorts cannot be underestimated.

“Pleasure Piers are coastal towns’ Disney Castle. They are the iconic landmark structure that hooks into the memory”

Rory Holburn, Executive Director,
Openwide International

Visitor numbers to seaside pleasure piers are only part of the story. Indeed, the pier can be considered as the seaside resort’s ‘weenie’. Walt Disney used the term in the design of the

3. National Coastal Tourism Academy (2016), Coastal Tourism, available at <https://coastaltourismacademy.co.uk/resource-hub/resource/2016-coastal-tourism>
4. Blackpool’s three piers: Enhancing Sustainability (2019), Blackpool Council
5. House of Lords Select Committee on Regenerating Seaside Towns and Communities (2019), The Future of Seaside Towns, available at <https://publications.parliament.uk/pa/ld201719/ldselect/ldseaside/320/320.pdf>

Disney theme parks, where weenies are the focal point of the park. Sircus⁶ states that a weenie is “the visually compelling focal element or ‘emotional magnet’...it keeps people moving; enticing them through spaces to a specific destination point. A weenie is more than simply a landmark, because it embodies meaning and elicits an emotional response and an action”.

As such, pleasure piers can be viewed as a seaside resort’s ‘weenie’. They are often the central point of resort development and regeneration (see for example the seafront regeneration strategies at Southport and Bournemouth) and act as the ‘anchor’ or ‘flagship’ which attracts further development, additional facilities, and the highest footfall at the seafront.

“People will always gravitate towards the pier. If they come to a seaside town with a pier, 90% of those people will gravitate towards the pier. I think there will always be an appeal to walk on a pier.”

Stanley Threadwell, Managing Director, Felixstowe Pier

6. Sircus, J. (2007) *Invented Places* in Carmona, M. & Tiesdell, S. Urban Design Reader, Elsevier



4. Pier review: review of seaside pleasure piers in 2020

A key part of this study was to monitor and evaluate all 61 seaside pleasure piers in the UK in 2020. The review of piers was undertaken using the National Piers Society's archive of pier-related news articles from 2009 to 2020. The pier review database details each pier's owner, ownership model/sector, listed status, current status regarding repair/maintenance, and then some of the key strengths and challenges of each pier.

4.1 Headline figures

- Pier ownership: 54% of piers operate within the commercial sector, 31% are local-authority owned and operated, 7% are owned and operated by third-sector organisations, and the remaining 8% operate through a partnership between public and third sector organisations.
- Current status: the vast majority of piers – 75% - are open and in good or satisfactory state of repair. A further 17% of piers are in need of maintenance/refurbishment work or are currently undertaking repairs. This leaves 8% of piers (5 in total) currently closed to the public, with two piers (Southampton Royal and Weston Birnbeck piers) at imminent risk of being lost.
- Listed status: almost half of all British seaside pleasure piers – 49% - are not afforded listed status because many of these piers have been significantly redeveloped or have lost sections of their original structures. However, Blackpool South and Central Piers appear to be notable exceptions to having listed status. 38% of seaside piers are Grade II (or equivalent) listed as structures of special interest, with a further 11% being Grade II* (important structures of more than special interest). This leaves less than 2% of seaside piers – only Clevedon Pier – as Grade I listed (structures of exceptional interest).

4.2 Pier categories

Pier owners highlight that no two seaside pleasure piers are the same. Each pier has its own unique history, set of circumstances, development and product offering. Piers are shaped by, and act as a barometer of the wider socio-economic context of the resorts in which they are located. Therefore, it is impossible to compare and contrast seaside piers on a like-for-like basis. However, the UK's pleasure piers can be broadly classified into 5 categories based on their current status of repair, product offering, and target markets. There are two categories relating to piers that are currently closed:

1) Waiting for the tide to turn

Closed and derelict piers that are at risk of being lost. Piers in this category may have support for regeneration but face numerous barriers. There are currently two piers in this category: Weston Birnbeck Pier and Southampton Royal Pier.

2) Rising from the waves

These piers are currently closed, but have established redevelopment/rebuilding plans underway, with significant community support. There are currently three piers in this category: Ramsey Queen's, Totland Bay, and Colwyn Bay Pier.

The main three categories of seaside pleasure piers focus on structures that are currently operational:

3) Seaside Special: Reflecting seaside entertainments and pastimes

Piers in this category might feature amusement arcades, funfair rides, fish and chips, cafes, candyfloss and doughnut kiosks, bars with family or evening entertainment, hook-a-duck and donkey derby type games and attractions, retail featuring seaside paraphernalia, and maybe even a fortune teller!

The key target market for piers in the Seaside Special category is the family market. These piers have a mass appeal to visitors, and are used by the local community for special events, fishing, or out-of-season strolls.

Currently 25 piers are classified as Seaside Special piers. 80% of the piers in this category are in commercial ownership. These piers tend to make full use of their deck space, which are filled with attractions and facilities. The remaining 20% of Seaside Special piers are in public sector ownership, but with attractions and facilities leased to commercial tenants (Southport, Deal, Southend, and the two piers at Weymouth). Those in public sector ownership tend to have fewer attractions than their commercial counterparts.

“Piers are businesses, they’re not hobbies, and you’ve got to be as commercial as you possibly can be. The degree to which piers can be commercial depends on their size, their structure and where they are, but they have to look at everything as a sales opportunity.”

Anne Ackord, Chief Executive Officer, The Brighton Pier Group

Only one pier in the Seaside Special category, Southend Pier, charges an entrance fee. As the longest pleasure pier in the world, Southend Pier requires significant maintenance funding.

Seaside Special piers tend to be highly seasonal, with the majority of their visitors during Easter, Bank, and school summer holiday periods. 72% of Seaside Special piers either operate reduced opening hours out of season, or close the pier deck during winter, or close the pier entirely from January to Easter. Only 7 Seaside Special piers (Brighton Palace, Eastbourne, Ryde, Southsea South Parade, Great Yarmouth Wellington and the two piers at Weymouth) remain open throughout the year.

80% of Seaside Special piers are located in popular seaside resorts with established tourism infrastructure and continuing function as a tourism resort (similar to Beatty et al’s¹ classification of ‘principal seaside town’). Due to their location, Seaside Special piers can successfully continue to offer traditional seaside entertainment to their visitors.



SEASIDE SPECIAL

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https://commons.wikimedia.org/wiki/File:Arcade_Coin_Pusher_detail.jpg <https://creativecommons.org/licenses/by-sa/2.0/>

4) Heritage piers: Encapsulating the heritage of the British Seaside

Heritage piers feature open decks and spaces for quiet contemplation, high-quality food and beverage, discrete and boutique retail, pier theatres and traditional end-of-the pier shows, multi-purpose visitor centres, and deck chairs and plenty of seating with kiosks and shelters to relax and enjoy the pier whatever the weather.

The key target market for Heritage piers is the mature family market and those aged 50+.

Heritage piers are valued by their local communities who view them as a key leisure/recreation facility, and are well-loved by visitors who enjoy the nostalgia of a visit to a Heritage pier.

There are 19 piers along the British coast classified as Heritage piers. All UK seaside Heritage piers are in public or third-sector ownership with the exception of Blackpool North Pier and Great Yarmouth Britannia Pier (which also feature many attractions within the Seaside Special product offering).

“The 50-plus age group consistently visit and support the pier, irrespective of the pier’s attractions. They visit because they appreciate heritage, the stunning landscape, and the quiet enjoyment.”

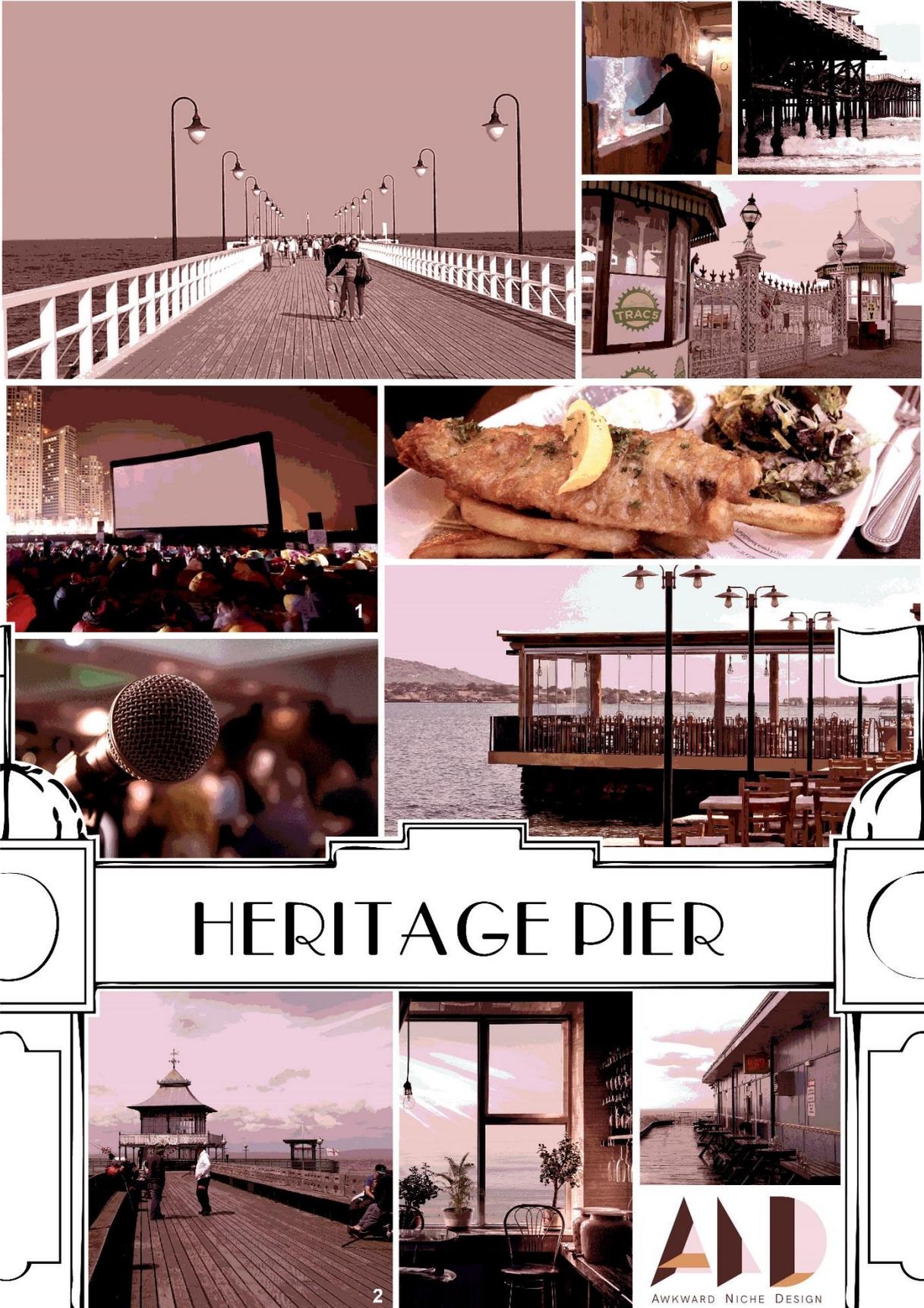
Ben Adeney, Chief Executive,
Swanage Pier Trust

Heritage piers are more limited in their income generation than Seaside Special piers and therefore will sometimes charge an entrance fee (in the case of Bangor, Clevedon, and Swanage). Over half of Heritage piers generate a significant portion of their income from their landing stage/jetty facilities for ferries or pleasure cruises. Four out of the five remaining seaside pier theatres in the UK are on Heritage piers (Blackpool North, Cromer, Great Yarmouth Britannia, and Worthing Pier theatres).

“Cromer is a heritage pier...the market here is one of the oldest demographics in the country. It fits really well with the slightly more gentle, less in-your-face tourism. It’s definitely for families and older people.”

Nick Baker, Corporate Director & Head of Paid Service,
North Norfolk District Council

In order to maintain ferry services and because many Heritage piers are viewed as leisure facilities by their local communities, 68% of piers in this category operate throughout the year. There are only 6 Heritage piers that reduce their opening hours or partially close during low season.



HERITAGE PIER

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5) 21st Century Innovators: Adapting to contemporary consumer demands

These piers are at the cutting-edge and have truly embraced contemporary visitor attraction product offering and technologies. Piers in this category feature adrenaline rides; virtual reality and augmented reality experiences; boutique retail; zip-lines and adventure sports; escape rooms; soft-play facilities; selfie experiences; interactive trails; quality café-bars and

“It’s got to be diverse. We take successful concepts and put them into the mix. The addition of the soft play facility has made the pier more of a lifestyle choice. Through the winter months it is continually full of locals and it’s bringing people here regularly who are then earmarking other things to do on the pier.”

Billy Ball, Managing Director, Clacton Pier

evening entertainment; and a rolling programme of events throughout the year.

The key markets for these piers are families with older children and the 18-35 age group. 21st Century Innovator piers offer a variety of all-weather attractions enabling these piers to act as flagship attractions for visitors and to be utilised by local communities out-of-season.

83% of 21st Century Innovator pier operate throughout the year, with the remaining 17% operating reduced opening hours during the winter.

Therefore, this category of pier is the least susceptible to seasonality.

There are 12 piers currently operating within this category. 67% of all 21st Century Innovator piers in the UK operate within the commercial sector, with a further 25% operating through partnerships with commercial or third sector organisations.

21st Century Innovator piers often act as catalysts for, or are central components in, resort regeneration. Significant investment in (or redevelopment of) Boscombe, Clacton, Felixstowe, Folkestone, Herne Bay, and Weston-Super Mare Grand piers has led to further development and regeneration in these resorts.

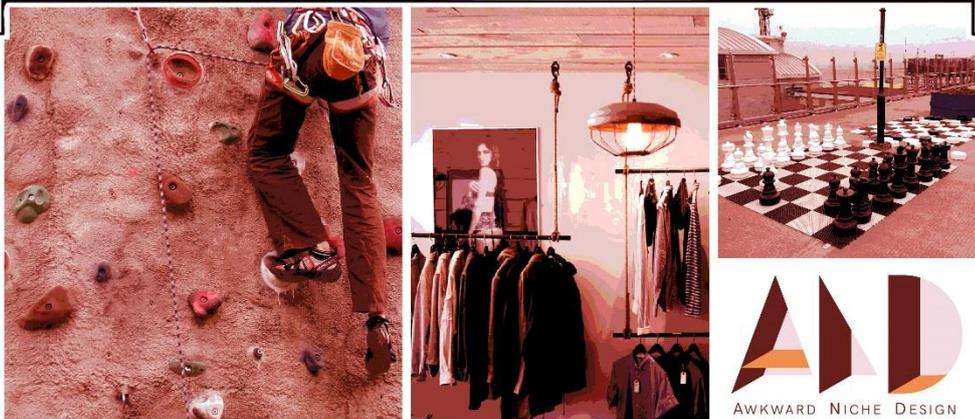
“Piers are reviving tired little seaside towns that don’t have much money. Herne Bay has very low employment, and the pier is a community asset that can help people raise their standard of living.”

Doreen Stone, Chairperson, Herne Bay Pier Trust

Only two 21st Century Innovator piers charge an entrance fee – Weston Grand and Bournemouth Piers.



21ST CENTURY INNOVATOR



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4.3 Pier Review: Analysis and evaluation of British seaside piers

Pier	Location	Listed Status	Sector	Owner	Pier category	Current status	Strengths	Challenges
Aberystwyth Royal	Wales	Grade II	Private	Revegata Aberystwyth Ltd	21st Century Innovator	Open - in good state of repair	Pier sold to Revegate in September 2016. Significant investment in facility upgrade and new developments, including plans for the refurbishment of the pier canopy and a viewing platform/balcony on the deck. Key target market is students (Pier Pressure nightclub).	Significant storm damage in winter of 2013/14 led to the former owners, Don Leisure, going into administration.
Bangor Garth	Wales	Grade II*	Public	Bangor City Council	Heritage Pier	Open - undergoing repair work	Undergoing £1.3m structural restoration work from 2017-2019, funded by Bangor City Council. Pier remains largely unaltered from its original Victorian design.	Funding shortfall of £600,000 announced in 2019, leaving restoration incomplete. Pier lacks long-term strategy for income generation and financial self-sustainability.
Beaumaris	Wales	Unlisted	Public	Isle of Anglesey County Council	Heritage Pier	Open - in good state of repair	Refurbished and reopened in 2012 (cost of £2 million). Popular with leisure craft/cruises.	Some concerns about ongoing maintenance of pier. Few income-generating facilities on pier.
Blackpool Central	England	Unlisted	Private	Blackpool Pier Company Ltd	Seaside Special	Open - satisfactory state of repair.	Sedgwick family bought Central and South Piers in 2015 for a reported £8 million. Ongoing investment in pier maintenance and ride refurbishment. The most visited of Blackpool's three piers.	Cross-subsidises other piers in company's portfolio.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Blackpool North	England	Grade II	Private	Blackpool Pier Company Ltd	Heritage Pier/ Seaside Special	Open - significant maintenance/ structural work required.	One of only 5 remaining pier theatres in the UK. 1930s sunset lounge unique to UK piers. Awarded World Monuments Watch status in 2017.	In 2013 there was £1m of storm damage to North Pier, the theatre and the Sunset Lounge. North Pier Theatre on the Theatres Trust at risk list.
Blackpool South	England	Unlisted	Private	Blackpool Pier Company Ltd	Seaside Special	Open - satisfactory state of repair.	Sedgwick family bought Central and South Piers in 2015 for a reported £8 million. Focus on adrenaline rides.	Targets same market as Blackpool Pleasure Beach.
Bognor Regis	England	Grade II	Private	Bognor Pier Leisure Ltd	Seaside Special	Open - significant maintenance/ structural work required.	Features sports bar and nightclub - students key target market.	Pier neck significantly shortened and is structurally weakened. In need of major structural repair work. Bognor Pier Trust had been working on HLF bid for pier, but support of private owner withdrawn in 2016.
Boscombe	England	Grade II	Public	BCP Council	21st Century Innovator	Open - in good state of repair	Fish food crazy golf. Interactive musical trail. Part of wider regeneration of Boscombe seafront.	Pier lacks long-term strategy for income generation and financial self-sustainability. Some ongoing concern over hairline cracks in concrete substructure.
Bournemouth	England	Unlisted	Public	BCP Council	21st Century Innovator	Open - in good state of repair.	Recent investment in Pier Approach refurbishment (£4 million) and private investment by Openwide International (£2 million) in Rock Reef and Zip Line	Pier toll operated by Council April to September. Admission currently £1.30
Brighton Palace	England	Grade II*	Private	The Brighton Pier Group PLC	Seaside Special	Open - in good state of repair	Bought in 2016 for £18 million. Pier is commercially successful, attracting almost 5 million visitors per annum. Significant investment in new attractions.	Profit warning during 2019. Reliance on visitor market rather than residents.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Burnham-on-Sea	England	Unlisted	Private	J Holland and Sons	Seaside Special	Open - in good state of repair.	Sold in 2017 after previous owner had invested £100,000 in new facilities. Ongoing investment in branding, amusements and rides.	Very small footprint.
Clacton	England	Unlisted	Private	Clacton Pier Company Ltd. (Billy & Elliot Ball)	21st Century Innovator	Open - in good state of repair	Significant investment (£4 million remortgage) in attractions and infrastructure. New attractions include soft play area and adventure golf. Refurbishment work due to complete in 2019.	Plans for Jolly Roger Building (Coastal Revival Funding £50,000 awarded for feasibility study in 2019) - sustainable use yet to be determined.
Cleethorpes	England	Unlisted	Private	Papa's Fish and Chip chain	21st Century Innovator	Open - in good state of repair	Pier was bought in 2016 after previous owners had invested £4.7 million in refurbishing (opened in Aug 2015) the pier. Now billed as UK's biggest fish and chip restaurant.	Pier lacks any other facilities/attractions.
Clevedon	England	Grade I	Trust	Clevedon Pier and Heritage Trust Limited	Heritage Pier	Open - in good state of repair.	£2.25 million visitor centre (funded through HLF, CCF and community shares) opened in May 2016. Only Grade I listed pier in UK. Trust successful in securing numerous funding bids.	Pier toll operated throughout the year - £3.30 charge.
Colwyn Bay Victoria	Wales	Grade II	Public /Trust	Colwyn Victoria Pier Trust/ Conwy Council	Rising From The Waves	Closed since 2008, currently dismantled	Pier has been dismantled and stored for future rebuild, subject to securing funding. Phase one of rebuild due to commence in 2019.	Storm damage in 2017 led to dismantling of the pier. CVPT still to secure funding to develop new pier beyond phase I.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Cromer	England	Grade II	Public	North Norfolk District Council	Heritage Pier	Open - in good state of repair.	Openwide International operate Pier Theatre and facilities. £1.2 million investment in maintenance and structural repairs by NNDC in 2019. Only remaining 'end of the pier' show.	Storm damage in 2013 and 2017 saw significant investment in repairs and maintenance by NNDC.
Deal	England	Grade II	Public	Dover District Council	Seaside Special	Open - in good state of repair.	£500,000 investment in refurbishment and maintenance of pier during 2018. A further £600,000 for refurbishment planned for 2019-20. Facilities leased to private investors.	Pier lacks long-term strategy for income generation and financial self-sustainability.
Dunoon	Scotland	Category B	Public	Argyll and Bute Council	Heritage Pier	Open - in good state of repair.	First phase of restoration (£2.3 million) completed in 2016. Works included substructure repair and refurbishment of pier deck and buildings.	Some concerns about ongoing maintenance of pier.
Eastbourne	England	Grade II*	Private	Lions Pier Ltd (Sheikh Abid Gulzar)	Seaside Special	Open - in satisfactory state of repair.	Lions Victorian Tea Rooms very popular with grey target market.	Pier fire in 2014. New owner in 2016. Significant investment required in Pier Theatre building (closed). Pier nightclub closed (currently used as amusement arcade).
Falmouth	England	Unlisted	Public	Carrick District Council	Heritage Pier	Open - in good state of repair	Falmouth Harbourside Community Interest Company formed to develop pier improvement plans.	Pier lacks long-term strategy for income generation and financial self-sustainability.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Felixstowe	England	Unlisted	Private	Pier Amusements (Felixstowe) Ltd	21st Century Innovator	Open - in good state of repair	Pier was partially demolished and rebuilt. Reopened in 2017 (cost £3 million) featuring new entrance building. Boardwalk Restaurant.	Pier neck remains closed.
Folkestone Harbour Arm	England	Unlisted	Private	Folkestone Harbour Company	21st Century Innovator	Open - in good state of repair	Reopened as a pleasure pier (former harbour arm) after £3.5 million investment in 2015. Pop up attractions/retail/ catering. Annual events programme. Part of wider regeneration of Folkestone.	Remains a seasonal operation.
Fort William	Scotland	Unlisted	Public	Highland Council	Heritage Pier	Open - satisfactory state of repair.	Council undertake regular maintenance of the pier to ensure that cruise boats can continue to land there. Restaurant on pier leased to private tenants.	No longer able to land ships above a certain weight due to dilapidation of structure.
Gravesend Town	England	Grade II *	Public	Gravesham Borough Council	Heritage Pier	Open - in good state of repair.	Ferry pontoon opened 2012 (Council, Development Agency, Interreg funding). Riva bar and restaurant is commercially successful.	Not perceived as a tourist attraction - used mainly as ferry crossing.
Gt Yarmouth Britannia	England	Grade II	Private	Family Amusements Ltd	Heritage Pier/ Seaside Special	Open - in good state of repair.	One of only 5 remaining pier theatres in the UK.	Most recent major refurbishment programme in 2008 - in need of updating.
Gt Yarmouth Wellington	England	Unlisted	Private	Family Amusements Ltd	Seaside Special	Open - in good state of repair.	New pavilion housing bowling alley opened in 2015 (£5 million). Council gifted the pier to current owners in 2013.	Loss of the majority of the pier neck beyond pavilion. Derelict Winter Gardens adjacent to the pier affects profits and visitor numbers.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Harwich Ha'penny	England	Unlisted	Public	Harwich Haven Authority	Heritage Pier	Open - in good state of repair.	Visitor centre operated by Harwich Society. Substructure refurbishment work (£340,000) recently completed.	A working pier - relatively limited visitor appeal.
Hastings	England	Grade II	Private	Lions Pier Ltd (Sheikh Abid Gulzar)	Seaside Special	Open - in good state of repair.	Reopened in 2016 after £14.2 million rebuild (HLF, community shares). RIBA Sterling Prize winner 2017.	Administration of Hastings Pier Charity in 2017. New (private) owner has unclear plans for the development of the pier. Some alienation of local residents.
Herne Bay	England	Unlisted	Public/Trust	Canterbury City Council, leased to Herne Bay Pier Trust until 2044	21st Century Innovator	Open - in good state of repair.	HBPT has received over £170,000 in external funding for the development of facilities and attractions on the pier, including £100,000 from the Coastal Revival Fund. Use of huts for small businesses creating retail experience.	Pier head remains cut-off from shoreward end of pier.
Hythe	England	Unlisted	Trust	Hythe Pier Heritage Association	Heritage Pier	Open - significant maintenance/structural work required.	Hythe Pier Heritage Association took ownership of pier in 2019. Narrow gauge railway with 1917 locomotives. Blue Funnel ferries run to Southampton.	£3 million required for maintenance and repair work.
Llandudno	Wales	Grade II *	Private	Tir Prince Leisure Group (Adam Williams)	Seaside Special	Open - in satisfactory state of repair.	Sold in 2015 for £4.5 million. Some investment in new attractions.	Planned redevelopment of former pier pavilion site has caused pier owner to delay pier maintenance works.
Lowestoft Claremont	England	Unlisted	Private	David Scott and Family	Seaside Special	Open - significant maintenance/structural work required.	2013 significant redevelopment of shoreward buildings, including the development of a live music venue, bistro and restaurant.	Pier deck closed. For sale for £2.5 million. Estimated £1.5 million needed for repair of pier neck.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Lowestoft South	England	Unlisted	Private	Associated British Ports (ABP)/ South Pier Lowestoft Ltd	Seaside Special	Open - in satisfactory state of repair.	Entertainment centre leased to Oulton Broad Leisure Ltd. Community campaign to reopen pier in 2015 was successful.	Predominantly a fishing pier. Community group currently trying to achieve charitable status to enable funding bids.
Mumbles	Wales	Grade II	Private	Amusement Equipment Co. Ltd (AMECO)	Seaside Special	Open - undergoing significant structural repair work	Longest serving pier owners/operators in UK (from 1933). Major refurbishment of lifeboat station in 2014 - funded by RNLI. Significant structural work to pier ongoing, funded by headland development of hotel and apartments. New attractions planned for old boathouse.	Redevelopment and structural work not due for completion until 2021.
Paignton	England	Unlisted	Private	Stade Developments (Hastings)	Seaside Special	Open - in good state of repair	Pier sold in 2014 for £1.85 million. Renovation work in 2015 with significant investment in new attractions and facilities.	Planned redevelopment of the pier entrance has yet to progress.
Penarth	Wales	Grade II	Public/Trust	Vale of Glamorgan Council managed by Penarth Arts and Crafts Ltd	21st Century Innovator	Open - in good state of repair.	The pier pavilion reopened in 2013 (£4.2 million HLF). Pavilion redeveloped as a multipurpose events and community space, including café and cinema.	Problems with sustainability/management saw a further £126,000 grant in 2017 from Resilient Heritage Programme.
Ramsey Queens	Isle of Man	Protected Register	Public/Trust	Isle of Man Government	Rising From The Waves	Closed - undergoing rebuild/structural repair	IoM Government agreed 5 year lease with Queen's Pier Restoration Trust in 2017.	Pier has been closed since 1991. Estimated cost repair and refurbishment circa £9 million.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Rothesay	Scotland	Unlisted	Public	Argyll and Bute Council	Heritage Pier	Open - in satisfactory state of repair.	Pier underwent £8.2 million refurbishment work to accommodate new ferry berth and foot passenger facilities in 2009.	Facilities for leisure/entertainment are limited - mainly a ferry pier.
Ryde	England	Grade II	Private	Wightlink PLC	Seaside Special	Open - in satisfactory state of repair.	Oldest seaside pier in the UK (opened in 1814). Island Line train link.	Estimated in 2015 that pier would need £8 million investment over 4 years to maintain substructure and Island Line train links.
Saltburn	England	Grade II*	Public	Redcar & Cleveland Borough Council	Heritage Pier	Open - in good state of repair.	Cliff lift refurbishment undertaken in 2018. In 2019 pier was fitted with lights as part of 150th anniversary.	Significant storm damage in winter of 2013/14. Repaired and reopened with improved flood defences in 2015. Pier length shortened since 1977.
Sandown Culver	England	Unlisted	Private	Sandown Pier Leisure Ltd	Seaside Special	Open - in good state of repair	Recent refurbishment and upgrade of facilities, including adventure play, sports bar, and crazy golf.	Seasonal opening of pier neck from Easter to September only.
Skegness	England	Unlisted	Private	UK Piers Ltd	21st Century Innovator	Open - in good state of repair	Major refurbishment and new attractions development 2016-18. New attractions include escape room, beach bar, and virtual reality.	Bid for European Regional Development Fund failed in 2013. Major storm damage in Winter 2013/2014. Reduced length of pier since 1978.
Southampton Royal	England	Unlisted	Private	Associated British Ports	Waiting For The Tide To Turn	Closed - pier to be demolished	Former gatehouse which is now used as restaurants.	Closed – proposed demolition as part of 'Royal Pier' waterfront redevelopment project, which was subsequently withdrawn in 2019.
Southend-on-Sea	England	Grade II	Public	Southend-on-Sea Borough Council	Seaside Special	Open - in satisfactory state of repair.	Estimated £20 million of phased investment planned (including £2 million in substructure repair) over 5 years. Development of new pavilion and new railway rolling stock.	Numerous fires have significantly damaged the pier over the years. Pier toll (£2 walking/ £5.35 train).

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Southport	England	Grade II	Public	Sefton Council (Silcock Leisure run the pier pavilion)	Seaside Special	Open - in good state of repair.	Currently undergoing £2.9 million refurbishment (£2 million from CCF) to improve access and new food and retail kiosks. Key part of wider seafront regeneration.	Loss of pier tram in 2016. Replacement road train only runs at peak times.
Southsea Clarence	England	Unlisted	Private	Southsea Clarence Esplanade Pier Co Ltd.	Seaside Special	Open - in good state of repair	Recent refurbishment of pier entrance and updating rides and attractions. High ropes course.	Pier resembles a funfair, rather than traditional pier
Southsea South Parade	England	Grade II	Private	South Parade Pier Ltd	Seaside Special	Open - in satisfactory state of repair.	Pier reopened in 2017 after significant investment (circa £5 million) in repair and refurbishment. Deep Blue restaurant and Gaiety bar opened in 2018.	Further repair/refurbishment work needed at pier head/deck.
Southwold	England	Unlisted	Private	Curious Pier Ltd (Gough Hotels - Robert Gough)	21st Century Innovator	Open - in good state of repair.	Tim Hunkin's 'under the pier show' mechanical arcade. Boardwalk restaurant and gallery/boutique retail.	Plans for 21st century art deco hotel at shoreward end have yet to come to fruition.
St. Anne's	England	Grade II	Private	St Anne's Pier Company Ltd	Seaside Special	Open - maintenance/structural work required	£50,000 funding from Coastal Revival Funds in 2018 for repair works to substructure	Further repair work required.
Sunderland Roker	England	Grade II	Public/Trust	Roker Heritage Group/Sunderland City Council	Heritage Pier	Open - in good state of repair.	Opened in 2018 - HLF funding £2.5 million. Tours of Pier tunnel and lighthouse. Forms part of wider regeneration of Roker seafront.	Significant storm damage in 2016.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Swanage Pier	England	Grade II	Trust	Swanage Pier Trust	Heritage Pier	Open – in good state of repair.	£2.2 million refurbishment and redevelopment of Marine Villas into visitor centre/bistro (£900,000 approved by HLF, with £900,000 required in match-funding from Trust).	Significant storm damage in 2013 (CRF). Ongoing issues with gribble worm. Pier toll £1 per adult.
Teignmouth Grand	England	Unlisted	Private	Grand Pier Teignmouth Ltd (Brenner family)	Seaside Special	Open - maintenance/ structural work required	Pier was fitted with 'storm baffles' to minimise impact of future storm surges.	Reopened 2014 after storm damage during 2013/14 winter. Further maintenance and refurbishment work required.
Torquay Princess	England	Unlisted	Public	Torbay Borough Council	Heritage Pier	Open - in good state of repair.	Pier reopened in 2016 after significant repairs due to storm damage in 2014. £1.7 refurbishment undertaken during 2018.	Limited leisure/entertainment facilities.
Totland Bay	England	Unlisted	Private	Totland Pier Ltd	Rising From The Waves	Closed - significant structural repair being undertaken.	Café at shoreward end reopened in 2017 (leased). Plans for reopening of pier in 2020.	Pier structure has significantly deteriorated. Plans to rebuild the pier were launched in July 2019.
Walton-on-the-Naze	England	Unlisted	Private	New Walton Pier Co. Ltd.	Seaside Special	Open - maintenance required.	New owner since 2016, announced £1.5 million planned investment in 2017.	RNLI concerns over the safety of pier structure.
Weston-S-M Birnbeck	England	Grade II*	Private	CNM Estates	Waiting For The Tide To Turn	Closed - significant structural repairs required.	Only pier in the UK to link to an island. Birnbeck Regeneration Trust campaigning to save pier.	Significant structural repairs required. Competition from Weston Grand Pier - limited financial viability of Birnbeck Pier.

4. PIER REVIEW: REVIEW OF SEASIDE PLEASURE PIERS IN 2019

Weston-S-M Grand	England	Grade II	Private	Grand Pier Ltd	21 st Century Innovator	Open - in good state of repair.	Pier pavilion and parts of the structure rebuilt (£38 million) and reopened in 2010 after major fire. New pavilion houses a variety of attractions, events spaces, soft play, and rides.	Pier toll of £1 introduced in 2014.
Weymouth Bandstand	England	Unlisted	Public	Weymouth & Portland BC (leased to Anthony Bennett)	Seaside Special	Open - in good state of repair		Pier was demolished in 1986 - only entrance building remains.
Weymouth Pleasure	England	Unlisted	Public	Weymouth & Portland Borough Council	Seaside Special	Open - in satisfactory state of repair	One on only 5 remaining pier theatres in the UK. Repair works undertaken in 2016 (£1.9 million). Currently undergoing further repair work.	Limited leisure/entertainment facilities. Jurassic Skyline tower to be removed.
Worthing	England	Grade II	Public	Worthing Borough Council	Heritage Pier	Open - in good state of repair.	Refurbished Southern Pavilion opened 2014 (works undertaken by private tenant). Pier of the Year 2019. One of only five remaining pier theatres in the UK.	Southern Pavilion under new ownership from 2019.
Yarmouth (I.O.W.)	England	Grade II	Trust	Yarmouth Harbour Commissioner	Heritage Pier	Open - in good state of repair.	£1 million repair work completed in 2018 (HLF Funded). Community engagement programme 'A Pier's Tale'.	Susceptible to gribble worm.

The Pier Review of all 61 seaside piers has been compiled using the National Piers Society's archive of pier-related news articles from 2009 to 2020.

5. Pier pressure: challenges faced by seaside pleasure piers

5.1 Pier design:

Each seaside pier has their own unique design and shape, presenting their owners with a number of challenges and opportunities. The development of each pier's attractions and facilities is determined by the design of the pier itself. While piers have continuously adapted and evolved their function and product offer, the design of the pier presents a number of constraints in relation to viable ownership models and attractions.

For seaside piers to be commercially successful they need to be relatively short, have a wide deck, have a substructure design capable of carrying the load of top-deck structures, and preferably have the area capacity for significant structures housing attractions and facilities at the entrance to the pier.

Aerial images⁷ of commercial sector piers in the Seaside Special and 21st Century Innovator categories show evidence of extensive development of buildings and attractions along the length of each pier, with relatively little open deck space. Southsea Clarence Pier is unusual as the structure runs parallel to the shore, resulting in a pier of considerable width, but barely touching the sea.

Having all-weather structures housing attractions at the landward entrance to the pier enables owners to operate these facilities throughout the year, even if the pier deck is closed or has reduced operating hours during the winter.



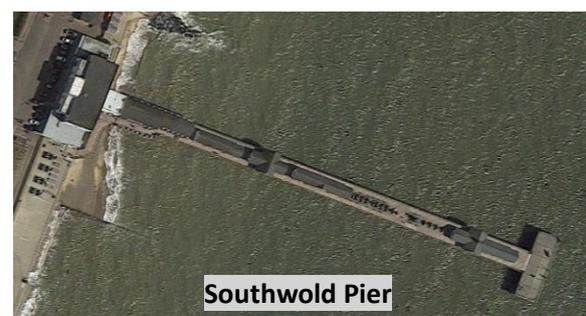
Southsea Clarence Pier



Blackpool Central Pier

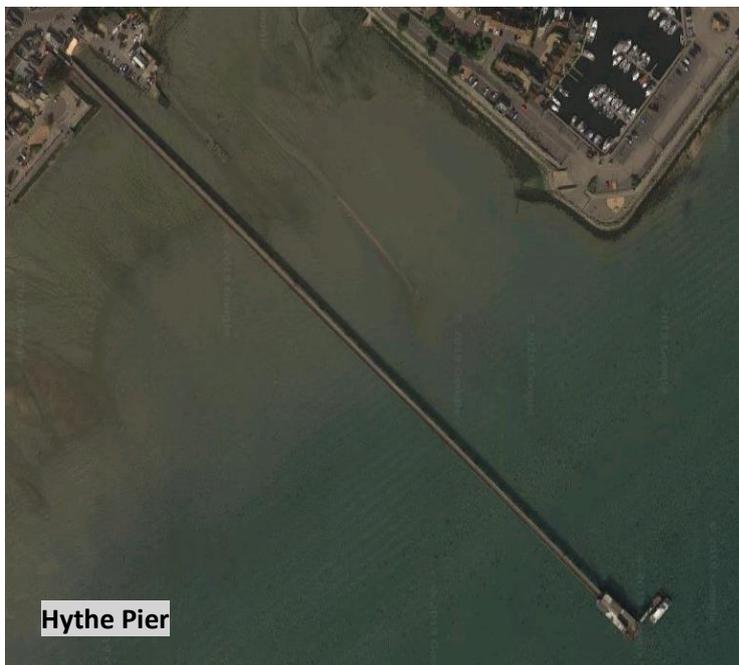


Clacton Pier



Southwold Pier

7. Aerial images courtesy of Google Maps (2019)



The majority of piers that are long and thin in design tend to be owned and operated by public sector or charitable trust organisations. Piers of significant length, and especially those over 400 metres, struggle to attract visitors along the pier neck and to the pier head during inclement weather. During storms or icy weather many piers close their decks on health and safety grounds.

Piers with relatively narrow decks are restricted in terms of the attractions they can offer. Such structures are not suitable for the construction of buildings bigger than kiosks or shelters, and therefore opportunities for all-weather facilities along the pier neck are limited.

Piers of such design also present their owners with increased maintenance and insurance costs. A longer pier is more at risk of significant fire due to difficult or restricted access to the structure, and at risk of being 'sliced through' by drifting vessels.

The above design implications mean that these piers are not commercially viable and continue to operate on the basis of public sector subsidisation or charitable donations.

Of course, not all piers are of such a significant length as those at Hythe, Southport or Southend. Nevertheless, Heritage piers also feature a number of similar design limitations for commercial revenue generation.

63% of Heritage Piers are Grade II listed or above, restricting any significant redevelopment that affects the architectural or historic value of the structure. Therefore, it is not possible for owners of such piers to significantly alter the footprint. The building of large structures on the pier itself is also restricted, and any smaller structures such as kiosks or windbreaks must be sympathetic and in-keeping with pier's original design.

Due to the significant costs of maintaining the substructure of any pier, alongside insurance costs, coupled with the limited facilities for income generation, the majority of Heritage piers are not financially self-sustaining.

Heritage piers are located in the most popular seaside resorts (such as Blackpool and Torquay) and smaller seaside towns (eg Clevedon and Cromer).

Heritage piers may look to develop attractions and facilities on the foreshore (where planning restrictions may be less stringent), or may be subsidised by the local authority, or charge an entrance fee in order to generate income. Commercial operators who own Heritage piers may seek to cross-subsidise from other businesses within their portfolio.



5.2 Pier risks:

By their very nature piers are risky structures and the challenges they face are manifold. Fire can be a significant threat to piers, especially as the majority of pier infrastructure from the deck upwards is made of flammable materials. Pier fires are difficult to tackle due to access issues and can spread quickly. There have been a number of significant pier fires during the 21st century, including Brighton's West Pier in 2003; Weston-Super-Mare Grand Pier in 2008; Hastings Pier in 2010; and Eastbourne Pier in 2014.



The damage caused to Eastbourne Pier by a fire which started in the amusement arcade (Source: Anya Chapman)

Pier owners and operators are very aware of the significant risk of fire, with the majority undertaking fire risk assessments, alarm testing, and evacuation drills. Piers are usually classed as 'category A' response by the fire services and some piers can also utilise the services of the RNLI. However, relatively few piers have automatic sprinkler systems or fire hydrants installed along the length of the structure, and those that do tend to be piers that have suffered significant fires in the past, such as Eastbourne, Weston Grand, and Southend piers. Southend Borough Council invested approximately £500,000 in the pier's hydrant and sprinkler system after the last major fire at the pier in 2005.

Piers are also at risk from storm damage and tidal surges. Since 2013 ten of the UK's seaside piers have suffered significant damage from the impact of storm surges, including Cromer, Saltburn, Teignmouth, Blackpool North, and Aberystwyth. Growing concerns over climate change and associated sea-level rise and storm surges impact on the future sustainability of piers. Research currently predicts a sea level rise of between 25cm to 2.5 metres around the UK coast during 21st century⁸, alongside increasingly frequent storm surge events, which will result in "a severe impact on UK coasts by 2080"⁹. Further research is needed on the impact of climate change and storm surges on seaside piers, and the potential for these structures to assist in coastal defence/management strategies.

8. Edwards, T. (2017), 'Current and future impacts of sea level rise on the UK', available at https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/663885/Future_of_the_sea_-_sea_level_rise.pdf

9. Fernandez-Bilbao, A. et al (2011), 'Impacts of climate change on disadvantaged UK coastal communities', available at <https://www.jrf.org.uk/report/impacts-climate-change-disadvantaged-uk-coastal-communities>

Despite the fact that storms have resulted in millions of pounds worth of damage to UK seaside piers during the last decade, relatively few pier owners have taken proactive measures to minimise the risk of storm damage to their structures. Teignmouth and Cromer piers have recently invested in storm baffles to help dissipate the waves and minimise damage to the pier structure. Nevertheless, the majority of pier owners are either unconcerned or unprepared for the potential impacts of climate change.

“Well if you’ve got rising sea levels...what are we going to do? Have an underwater pier? Are we going to get extensions to the pier legs? I’m not saying it doesn’t happen but it’s nothing we can actually do anything about”.

John Bollom, Managing Director, Mumbles Pier

“I think our focus is keeping the pier upright. If we ever get into a situation where sea levels rise significantly, enough to compromise the landing stages, then adjustments will need to be made, when and if that happens”.

Ben Adeney, Chief Executive, Swanage Pier Trust

Building resilience amongst pier owners is needed as a matter of urgency. A holistic view of resilience is required here – embracing technical, physical, socio-economic and human aspects. Building entrepreneurial resilience amongst pier owners through training and development is a cost-effective solution and increases community engagement and responsibility for climate change planning.

Another significant risk to those piers that have wooden piles, is the gribble worm, which can be thought of as a type of marine woodlouse. The majority of seaside piers in the UK are built on cast iron piles, but piers such as Yarmouth in the Isle of Wight, Swanage, and Gravesend are constructed on wooden piles.



Damage caused by gribble worms to one of the wooden piles at Swanage Pier (Source: Anya Chapman)

Although piers constructed on wooden piles generally utilise Greenheart timber, considered to be the most resistant to marine erosion, these piles will still need to be replaced every 25 to 30 years, further adding to the risks and costs of operating a pier.

5.3 Pier costs:

Many piers are circa 150 years old, and as these structures advance in age the risks, and costs associated with them, increase. Maintenance of pier substructures, decking, and buildings is an ongoing task that can cost owners between £250,000 to £2,000,000 per annum depending on the size, location, and usage of the pier. Best practice pier owners and operators highlight the importance of ongoing maintenance and the allocation of an annual budget for maintenance.

“We spend an enormous amount of money on maintenance above and below the deck. If you haven’t got the money to spend on it, it’s going to deteriorate... and the pier would fall into the sea.”

Anne Ackord, Chief Executive Officer, The Brighton Pier Group

“Keeping a pier is high maintenance. Too often the risk is that a generation takes the cash out, and defers maintenance. It’s the deferred maintenance issue that becomes the biggest challenge.”

Rory Holburn, Executive Director, Openwide International

Pier owners need to allocate a significant part of their annual budgets to the maintenance of their piers, despite the fact that this investment in maintaining the structure does not generate income. Development of new income-generating attractions on piers must be budgeted for in addition to maintenance costs.

“We are spending an awful amount of money on the structure itself this year, which has really eaten away at our cash flow, and having to do some really big steel repairs. With the pier being such an old and complex building there is always going to be those maintenance costs involved, which will always be a challenge.”

Gabriella Wilkinson, Administration Manager, Skegness Pier/UK Piers Ltd

In addition to the usual operating costs of any tourist or leisure facility (such as staff wages, stock, or marketing), pier owners also have the significant cost of insuring their structures. Many pier owners talk of the difficulty in insuring their piers, especially after major fires at Weston, Hastings and Eastbourne piers which saw the price of insurance premiums significantly increase. In addition, many insurers withdrew from insuring pier structures, leaving relatively few companies in the market and further reducing competitive pricing for pier insurance.

“(Insurance) underwriters are running scared simply because of what has happened primarily at Weston. That was the final nail in the coffin, as far as insurers were concerned, and they started dropping piers left, right and centre, so there are very few players left in the market place now to underwrite piers. That really was a game changer.”

Stanley Threadwell, Managing Director, Felixstowe Pier

Those piers in public sector ownership pay comparatively less in insurance premiums than their commercial or charity counterparts. This is because councils can ‘bundle’ piers

“We pay £58,000 per year for a £16 million total loss. We have £58 million worth of assets and they are all insured with Zurich so it is just part of an overall premium, but it’s the biggest individual player in there. Potentially, if we were just insuring that we might have difficulty, but it is part of a portfolio of assets.”

Russell Tanner, Assets and Property Programme Manager, North Norfolk District

together with other assets in their property portfolio and are willing to pay a higher policy excess.

Conversely, insurance premiums for piers in commercial sector ownership can vary widely, depending on age, condition, size, location, and construction of the pier structure. Some commercial sector pier owners admit that their insurance is limited only to the buildings on the pier as insuring the structure itself would make the pier commercially non-viable. Those that do insure the pier structure can pay between £150,000 to £800,000 per annum for their insurance premiums. However, very few piers are insured for total loss.

“The problem is no one can afford to insure piers for their reinstatement. It would be £50 to £100 million to bring this (pier) back. You can’t afford to insure for that. There will be no pier in the country that is insured to its full reinstatement. It’s impossible to do it.”

Anne Ackord, Chief Executive Officer, The Brighton Pier Group

Therefore, the limited insurance of pier structures can be considered a major threat to the future sustainability of seaside piers. The National Piers Society has been campaigning for a consensus between the insurance industry and pier owners on a set of safety management requirements based on certification and annual inspection. Such guidelines and procedures may allow the insurance industry to regain confidence in insuring piers and reduce policy premiums.

When piers suffer significant damage from storms, fire, or other risk factors, few will be fully restored due to the limitations of pier insurance policies. This is especially the

case for the 54% of seaside piers operating within the commercial sector as their owners have limited financial reserves to undertake full restoration of significant loss to their piers.

At present, external funding and grants for pier restoration is predominantly restricted to public and third sector/charity owners.

External funding sources available to seaside piers

Organisation	Funding scheme	Availability
UK Government	Coastal Communities Fund. Funding for projects over £50,000, no upper cap.	Available to all sectors, but must be in partnership with public/third sector organisations and Coastal Community Teams.
UK Government (England only)	Coastal Revival Fund. Funding for heritage projects up to £50,000.	Available to all sectors, but award is made to local authority to distribute funds.
The National Lottery Heritage Fund	A range of grants from £3,000 to £5 million. Heritage Horizon Awards of £5 million +	Grants of up to £10,000 available for heritage assets in private ownership. Grants over £10,000 are for not for profit organisations or partnerships led by not for profit organisations.
Welsh Government/ Development Bank of Wales	Welsh Tourism Investment Fund. Funding (a mixture of grant and loan repayments) for £100,000 to £5 million.	Available to all private and third sector tourism organisations based in Wales
CADW (Wales only)	Historic Buildings Grant. Match funding of up to £50,000 for capital repair projects.	Available to all sectors. Listed buildings only.
Historic England (England only)	Various grant schemes available for repairs/ protection/ urgent works notices of historic buildings.	Often restricted to listed buildings at or above II* or to structures on the 'heritage at risk' register.
Historic Environment Scotland (Scotland only)	Historic Environment Repair Grant. Funding of £10,000- £500,000 available.	Limited to not-for-profit organisations or partnerships led by not for profit organisations.
Architectural Heritage Fund	Various grants from £15,000 to £350,000. Heritage Impact Fund loan scheme £25,000 to £500,000.	Limited to charitable/community organisations only.
Regional/ smaller funding schemes		
The Heritage Funding Directory	Lists grants and funding schemes available to specific sectors/structures.	Various – see full funding directory at https://www.heritagefundingdirectoryuk.org/
Commercial sector organisations	Various companies offer relatively small-scale grants.	Limited to not-for-profit organisations. Searchable database (subscription required) at https://fundsonline.org.uk/

Those piers operating within the commercial sector that have previously applied for significant external funding have been declined, such as the European Regional Development

Fund bid for £1.2 million which involved Skegness Pier, or Felixstowe Pier’s bid in 1999 for Heritage Lottery funding for repairs to the pier neck.

“We formed a trust with the council and a couple of other trustees and we spent something in the region of £90,000 on feasibility studies and demand analysis. Anyway, that fell on stony ground having done all that work, basically because we are predominately a privately-owned pier.”

Stanley Threadwell, Managing Director, Felixstowe Pier

External funding bids secured for seaside piers

Pier	Lead organisation	Funding source
Blackpool’s three piers	Blackpool Council	World Monuments Fund ‘Watch Status’. Funding for two ‘watch days’ held on Blackpool North Pier and international conference on climate change and coastal heritage. Coastal Revival Funding for economic sustainability study.
Bognor Regis Pier	The Bognor Pier Trust	Awarded Coastal Revival Funding and Coastal Communities Funding. Heritage Lottery Funding round one awarded but bid later withdrawn.
Clacton Pier	Tendring District Council	Coastal Revival Funding for feasibility study of Jolly Roger building.
Clevedon Pier	Clevedon Pier Trust	Awarded Heritage Lottery Funding (twice), Historic England grant, Coastal Communities Funding
Gravesend Town Pier	Gravesham Borough Council	Awarded Interreg and Development Agency funding for pier landing stage.
Hastings Pier	Hastings Pier Charity	Awarded Heritage Lottery Funding for rebuilding pier after fire.
Herne Bay Pier	Herne Bay Pier Trust	Awarded Coastal Revival Funding (twice).
Penarth Pier	Penarth Arts & Crafts Ltd	Awarded Heritage Lottery Funding for planning of pier pavilion restoration.
Saltburn Pier	Redcar & Cleveland Borough Council	Awarded Heritage Lottery funding for pier restoration.
Southsea South Parade Pier	South Parade Trust	Awarded Heritage Lottery Funding for consultation event, and Coastal Revival Funding for pier roof repairs.
Southport Pier	Southport CCT & Sefton MBC	Awarded Coastal Community Funding for pier restoration and upgrading of facilities.
St Anne’s Pier	St. Annes Enterprise Partnership CCT	Awarded Coastal Revival Funding for structural repairs.
Sunderland Roker Pier	City of Sunderland Council	Awarded Heritage Lottery Funding for restoration of pier
Swanage Pier	Swanage Pier Trust	Awarded Heritage Lottery Funding (three times), Coastal Communities Funding for pier restoration and development.
Yarmouth Pier (IoW)	Yarmouth Harbour Commissioners	Awarded Heritage Lottery Funding (twice) for pier restoration and public engagement project.

Of the 15 piers listed above that have received external funding, only 5 of them operate within the commercial sector, and these funding bids have been led/secured by partners from the public sector or charitable organisations. The piers that have secured the largest amounts of external funding all operate as charitable trusts, such as Clevedon, Hastings (formerly), and Swanage piers.

“Profits are becoming more and more marginable because of higher costs now. I think the government needs to put in a bit more of a helping hand.”

Stanley Threadwell, Managing Director,
Felixstowe Pier

While the funding opportunities for piers in the public and not for profit sectors are to be lauded, and many have benefited from securing external funding, piers in commercial ownership are without access to such funds. Therefore, if commercial piers require significant maintenance or repair this has to be self-financed.

A number of commercial sector pier owners advocate exemption from business rates for seaside piers, to enable further investment in the maintenance of these structures. Many have suggested that they would prefer a rate rebate or ‘ringfencing’ scheme for pier maintenance rather than the opportunity to apply for external funding.

“If we can persuade the Government to say to pier operators look, we should pay business rates, but our business rates should be ring-fenced and we should be forced to spend that money deck-down (on the pier’s substructure) and provide evidence that that’s been spent. It’s being put back into something that’s going to sustain jobs, keep people visiting, it’s almost a no brainer isn’t it? There are 60 piers around the country and there’s £100,000 rates, it’s only £6 million. That’s what piers need.”

Billy Ball, Managing Director, Clacton Pier

“I do think rates are a big issue for piers. I don’t ever see why there shouldn’t be some sort of exemption for piers.”

John Bollom, Managing Director, Mumbles Pier

“If there was some help that the piers could get through rateable value, I think this is the clearest and the fairest way. Just basically a reduction in rates, in fact if any rates at all, because it is the fact you’re maintaining and investing in the pier which helps the fabric of the resort, and actually adds something to the resort.”

Stanley Threadwell, Managing Director, Felixstowe Pier

6. Best practice piers: the top ten seaside pleasure piers

While the challenges faced by seaside piers have been discussed, the majority are rising to these challenges and maintaining successful and thriving piers, enjoyed by visitors and residents alike. There are many 'best practice' piers that could have featured in this study, but the following section will draw on only ten piers, in no particular order, to highlight aspects of their operation that are successful, sustainable, and leading in the field. The ten pier organisations are drawn from the commercial, public, and charitable/trust sectors and a variety of 'Seaside Special', 'Heritage', and '21st Century Innovator' piers.

Interviews with best practice pier owners were conducted between March and May 2019, covering pier ownership, management and operation, the significance and role of the pier, challenges faced, and the future for the pier. The interviews were recorded with permission and transcribed in full.

The identification of the best practice piers was enabled through the 'pier review' database and in discussion with members of the National Piers Society's executive committee.

6.1 Bournemouth Pier: Unique adventure sports attractions

Bournemouth Pier is owned by Bournemouth Christchurch and Poole (BCP) Council, which operate the amusement arcade at the pier's entrance, maintain the pier, and operate the seasonal (April to October) pier toll, which is currently £1.30 adult/ 90 pence junior. Since 2006 the Council have leased the above-deck attractions to Openwide International on a 25-year lease. The above-deck attractions include the Key West restaurant and events space, catering and retail outlets at the front of the pier, and the pier theatre. In 2014 the pier theatre was converted to the Rock Reef indoor climbing and adventure activity centre, and the Pier Zip was installed at the end of the pier, the first pier-to-beach zipline, with over £2 million invested by Openwide.

“It had to be an entertainment-based use for the theatre, it had to appeal to the footfall market and ideally have a local market appeal as well, and that is what Rock Reef provides.”

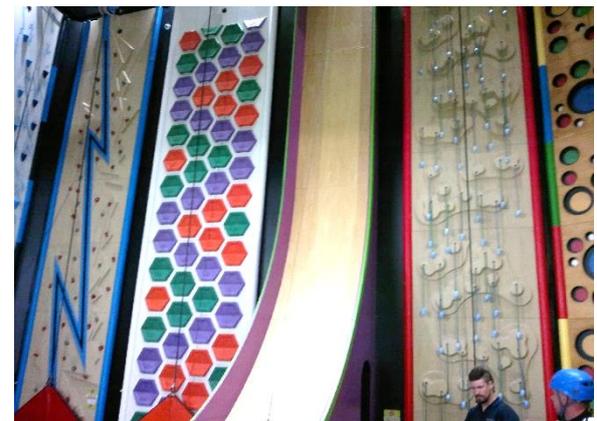
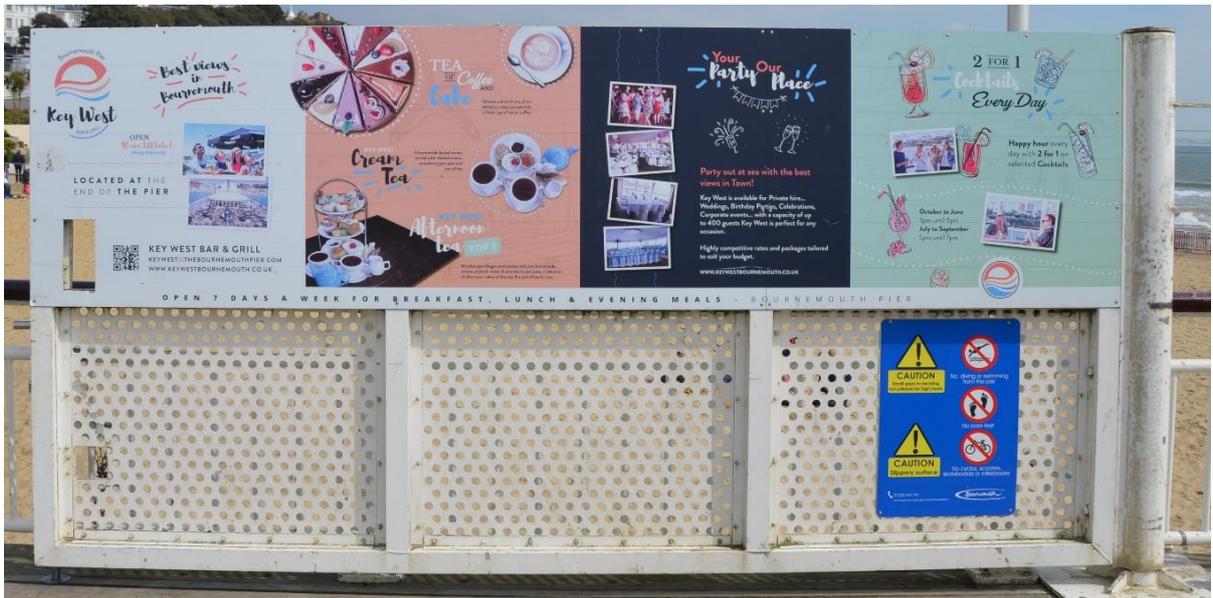
Rory Holburn, Executive Director, Openwide International

What Bournemouth Pier does well:

- **Innovative and iconic attractions:** The PierZip is a unique attraction appealing to Bournemouth's visitor market, and also acting as an effective marketing tool to attract footfall onto the pier. The Rock Reef facility has provided a novel and commercially viable use for the former pier theatre venue which appeals to local residents and increases footfall out of season.
- **Marketing and promotions:** the use of the large LED screen on the pier to advertise events and special offers alongside signs at the front of the pier (ahead of the pier toll) to raise awareness of the attractions on the pier. Good use of promotions and discounts out of season to appeal to the local catchment area and increase repeat visits.
- **An effective public-private partnership:** a relatively long-term lease of 25 years has enabled Openwide to invest in major attractions for the pier while having the longevity of the lease to ensure a return on their investment. Short-term partnerships would hinder such investments.
- **Events and party-packages:** The use of Key West restaurant as a wedding venue and functions hire and the Rock Reef is a popular venue for corporate team-building events and children's parties, ensuring out-of-season use.
- **The use of the pier in wider resort strategies and marketing:** the pier features prominently in marketing campaigns for Bournemouth and Dorset at a national and international scale. The pier is the 'major destination point' for the central beach area in the current Bournemouth Seafront Strategy. Bournemouth Pier is therefore of strategic importance in attracting visitors to the resort.

All pictures of 'best practice' piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier.

6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Bournemouth Pier (clockwise from top left): the recently refurbished pier approach landscaping and attractions, which cost BPC Council approximately £4 million and links the pier and seafront to the lower gardens; the PierZip which opened in 2014 is the only pier to beach zip line; marketing the pier’s attractions and facilities at the toll booth; some of the clip and climb walls and ‘death slide’ inside the Rock Reef attraction; the Rock Reef café with the highline ropes course in the background.

All pictures of ‘best practice’ piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier.

6.2 Brighton Palace Pier: The most visited pier in the UK

With an estimated 4.68 million visitors¹⁰ per year, Brighton Palace Pier is the most visited pier in Britain and the fourth most visited attraction in the UK. Brighton Palace Pier is currently the only seaside pier operating as a public limited company (PLC) and forms part of the Brighton Pier Group. The pier operates throughout the year offering a range of traditional seaside attractions including rides, amusement arcades, bars and restaurants alongside facilities such as events and conferencing spaces and soft play.

“We’re just staying in tune with what people want...people want to sit in a restaurant, drink a cocktail, and look out at sea (and) we create those better environments.”

Anne Ackord, Chief Executive Officer, The Brighton Pier Group

What Brighton Palace Pier does well:

- Marketing and promotions: Brighton Palace Pier has the largest social media following of all UK piers, with over 50,000 likes on Facebook, 10,000 followers on Twitter, and was recently named by Google as the 5th most Instagramable location in the UK. The pier runs a series of events throughout the season, mainly focusing on free music or children’s events. Once on the pier there are plenty of signs and banners advertising the pier’s attractions and facilities.
- Increasing dwell time on the pier: through providing deckchairs which are free to use. By increasing the time visitors spend at the pier, there is increased opportunity to spend.
- Regular and ongoing maintenance of the pier structure: planned maintenance with an allocated budget and an annual full survey of the pier substructure.
- Engaging local audiences: reverting to the use of ‘Palace’ in the pier’s title after a campaign by residents which featured prominently in the local press. Launching a ‘resident’s card’ which offers discounts and promotions to Brighton and Hove residents.
- Local employment: Brighton Palace Pier employs over 500 people during peak season and maintains a core of 200 permanent employees, making the pier one of the largest employers in Brighton.
- Events and functions: private, corporate, and wedding function packages with flexible venue capacity of up to 3000.
- An experienced and innovative management team: led by CEO Anne Ackord who was General Manager of the pier under previous ownership.
- Upgrading of food, beverage and retail offering: in keeping with the Group’s strengths, and providing quality facilities and products. Revenue generation is now split equally between the arcades, rides, and bars and restaurants on the pier.
- Targets a broad range of markets: due to the wide range of products and facilities that the pier offers.

All pictures of ‘best practice’ piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier.

10. Visit Britain (2018) ‘Annual Survey of Visits to Visitor Attractions’, available at: <https://www.visitbritain.org/annual-survey-visits-visitor-attractions-latest-results>

6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Brighton Palace Pier (clockwise from top left): the Sunset Garden cocktail bar; advertising the 'Brighton Music Walk of Fame' interactive trail and app, a joint venture between the pier and Fame Media Tech; the famous 'Brighton Palace Pier' sign which replaced 'Brighton Pier' signage with the name change; children's soft play facilities suspended above the amusement arcade games; free deckchairs to increase dwell time on the pier; crowds enjoying the pier deck and funfair rides.

All pictures of 'best practice' piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6.3 Clacton Pier: The all-weather pier

The pier has been owned and operated by brothers Billy and Elliot Ball since 2009. Since taking ownership, they have undertaken a significant multi-million pound investment in the pier to make it a year-round operation, alongside diversifying the product offering to appeal to Clacton's visitors and residents. The pier now features bars, restaurants, soft play facilities, an aquarium, adventure golf course, performance and events venue, and amusement arcades and rides.

“If you look at a traditional summer season in a seaside town it's really only 12 weeks, so it was fairly obvious very early on that we had to do something to combat that. We always had a vision that we wanted to create an indoor offering that was more 52 weeks a year.”

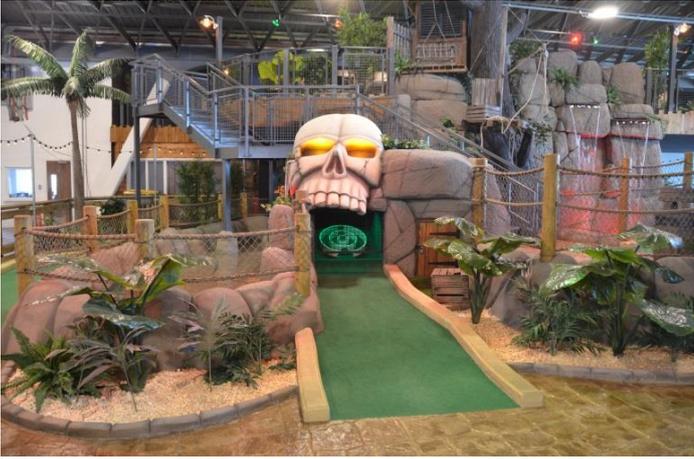
Billy Ball, Managing Director, Clacton Pier

What Clacton Pier does well:

- Indoor all-weather facilities: enabling the pier to operate throughout the year and reduce seasonality. Investment of over £4 million to extend the pier's indoor product offering and to target different market segments.
- Use of technology to make operating systems more efficient: use of Planday app for staff timeclock, communication and payroll; use of Mobaro app for allocating team and individual employee tasks; integrated Point of Sales (POS) systems for monitoring sales and stock levels.
- Use of technology to enhance visitor experience and increase retention: monitoring of visitor numbers and visitor spend; use of radio frequency identification (RFID) tags in ride wristbands to monitor ride usage; annual pass card offering unlimited rides and discounts at the pier's other facilities; Clacton Pier Fun Card which acts as a contactless payment and discount card which can be used on the majority of the pier's attractions.
- Strong public relations: experienced in-house marketing team; building and developing the 'Love Clacton' brand in conjunction with other organisations; relatable figureheads in Billy and Elliot Ball; consistent provision of information via the Clacton Pier blog and social media sites.
- Quality amusement arcade: featuring the latest machines which are well-maintained. The redemption offering (where tickets are exchanged for prizes) is excellent and the use of the Fun Card as a ticket storage device increases customer loyalty and repeat visits.
- Wider links with amusement and funfair industry: enabling the updating/rotation of rides and attractions to encourage repeat visits.
- Engaging local residents: development of the 'Discovery Bay' soft play facility, catering provision, and children's party provision which encourages year-round use.

All pictures of 'best practice' piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Clacton Pier (clockwise from top left): ‘Love Clacton’ branded merchandise in one of the pier’s souvenir shops; the amusement arcade and redemption shop with prizes displayed; themed ‘Skull Point’ adventure golf; advertising the benefits of using Clacton Pier’s Fun Card; indoor dodgem track located on top of a catering facility; ‘Number 1 North Sea’ address/branding on the east side of Clacton Pier.

All pictures of ‘best practice’ piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6.4 Cromer Pier: The finest seaside pier theatre entertainment

Cromer Pier is owned and maintained by North Norfolk District Council, with above-deck facilities leased to commercial operator Openwide International. The pier features the only remaining ‘end of the pier’ variety show during the summer season and the pier theatre hosts a range of shows throughout the year and has a seating capacity of 500. The pier features a theatre bar and catering facilities alongside the theatre box office and gift shop. The end of the pier houses the RNLI Cromer lifeboat station which is open to visitors.

“In some ways it is incredibly fragile but you just have to accept it’s such an iconic structure in the middle of a beautiful part of the world, and that people want it to be there. Cromer and North Norfolk would be far worse for not having the pier. We have recognised its iconic nature, therefore we want to keep it. We are custodians and it’s our responsibility to look after it.”

Nick Baker, Corporate Director & Head of Paid Service, North Norfolk District Council

What Cromer Pier does well:

- Ongoing investment in maintenance: Cromer Pier has suffered tidal surge and storm damage with North Norfolk District Council (NNDC) spending significant sums in repairing and maintaining the pier structure.
- Use as a filming location: Cromer Pier has featured in high-profile TV and films, most notably appearing as the backdrop for BBC One’s Christmas 2018 campaign, which increases awareness of, and footfall on, the pier.
- Successful public-private partnership: operating the above-deck on a ten-year lease with Openwide International, providing the expertise in operating the theatre and restaurant.
- Annual programme of events: Many of Cromer’s events are hosted, or are centred on, the pier such as the New Year fireworks, the annual Carnival, Folk on the Pier, or the World Crabbing Competition. Events are used to successfully extend the season.
- Providing facilities and the aesthetic of a traditional heritage pier: careful consideration of planning regulations and Grade II listed status in new developments and ensuring that attractions are in-keeping with the pier’s heritage.

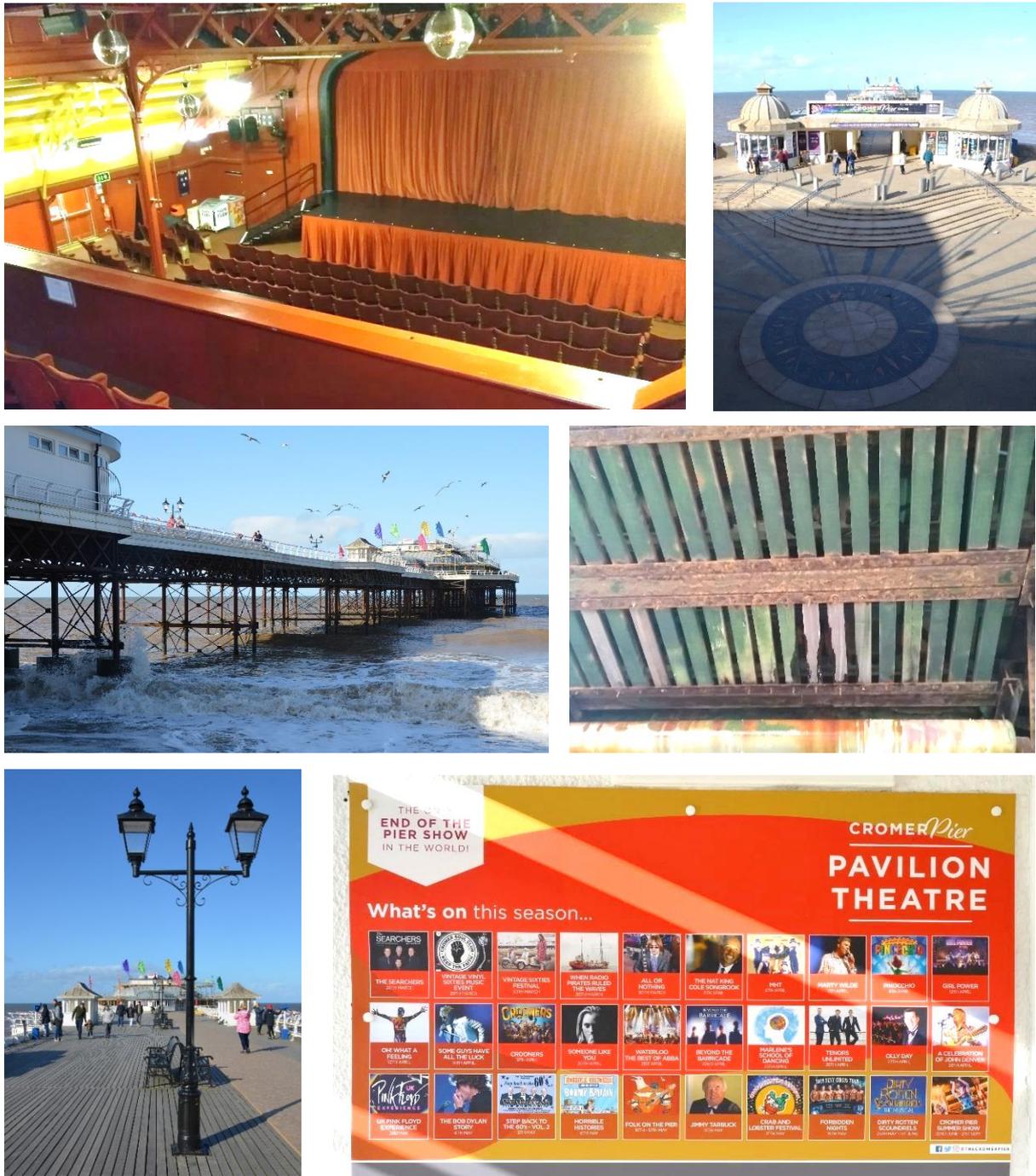
CROMER PIER REPAIR AND MAINTENANCE SPENDING 2018-19

- £150,000 on 5-year programme of substructure surveys
- £550,000 on survey priority works (steel trusses, tie bars, substructure decking support and decking)
- £8,000 upgrading fire alarm system
- £37,000 on new Pavilion Theatre stage flooring
- £45,000 on new deck lighting, benches and redecorating
- £25,000 upgrading stage lighting
- £300,000 reroofing works to Pavilion Theatre
- £30,000 new pier sewage storage tank and pump

Figures provided by Russell Tanner, Assets and Property Programme Manager, North Norfolk District Council

All pictures of ‘best practice’ piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Cromer Pier (clockwise from top left): The Pavilion Theatre interior showing the recently refurbished stage; the entrance approach to the pier, advertising the ‘Cromer Pier Show’ for summer 2019 and showing part of the £8 million sea defence scheme which was completed in 2016; under the pier ‘storm baffles’ which are used to dissipate waves and prevent the lifting of pier decking and above-deck structures; the Pavilion Theatre programme January to September 2019; the deck of Cromer Pier showing the symmetry of the pier buildings and structures; Cromer Pier substructure, featuring the concrete encasements to support the pier piles from erosion.

All pictures of ‘best practice’ piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6.5 Felixstowe Pier: Successful product and market diversification

Felixstowe Pier has been owned and operated by the Threadwell family for over 50 years, bringing a wealth of experience and expertise. Alongside Felixstowe, the Threadwells also own Great Yarmouth Britannia and Wellington Piers, with each operation catering for a different market segment. In 2017 Felixstowe Pier reopened after undergoing major redevelopment and now offers a state-of-the-art Family Entertainment Centre, the renowned Boardwalk café bar, and other catering and retail outlets. The pier operates throughout the year.

“We brought a completely different demographic of people because of the Boardwalk offering, where people are coming down purely for that and would never think about walking in the Family Entertainment Centre. They are coming down for that experience of sitting on the deck having fish and chips over the sea.”

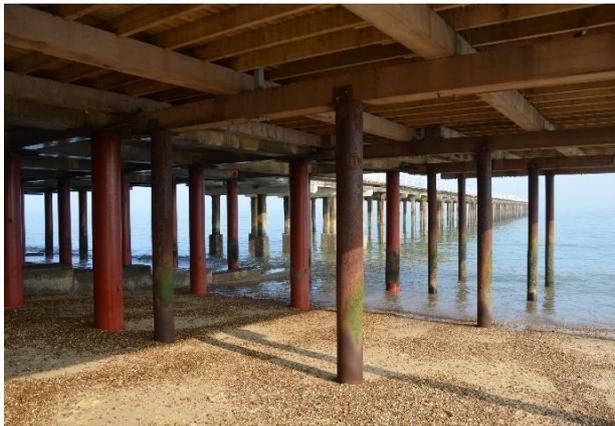
Stanley Threadwell, Managing Director, Felixstowe Pier

What Felixstowe Pier does well:

- Rejuvenation of product offering and pier structure: Felixstowe Pier was rebuilt to offer open deck space and a multi-purpose all-weather venue housing a range of facilities and attractions at a cost of over £3 million. The truncated pier neck, closed since late 1990s, was left in-situ as the new pier developed at the foreshore, reducing seasonality.
- Clear target markets: the redevelopment of the pier enabled the owners to upgrade their food and beverage offering with the Boardwalk café bar, providing quality food and an upmarket environment. The pier’s Family Entertainment Centre appeals to the family market. The piers at Great Yarmouth also have clear market segments, with Britannia Pier appealing to older visitors and residents, and Wellington Pier aimed at the younger family market. Therefore, each of the three piers target different segments, minimising competition within the portfolio.
- Wider regeneration of the resort seafront: the pier acts as a focal point for Felixstowe seafront, which has undergone significant regeneration since 2012 with the restoration of the seafront gardens, reopening of the Spa Pavilion, residential development, and the redevelopment of the former boating lake into an events space.
- Recognising the importance of walking over the waves: designing the new pier to include deck space and seating and recognising that this facility remains the pier’s unique selling point.
- A wide range of evening entertainment and events: hosted throughout the year within the Boardwalk café bar, appealing to different market segments and attracting locals and visitors.

All pictures of ‘best practice’ piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Felixstowe Pier (clockwise from top left): The newly rebuilt entrance building to the pier with public space to the front which can be utilised as additional events space; side view of the new pier development showing the closed pier neck; the deck being utilised for alfresco dining; the bright and airy surroundings of the Family Entertainment Centre; the upmarket interior of the Boardwalk café bar; the pier substructure clearly showing the newly built shoreward section in comparison to the older pier neck.

All pictures of 'best practice' piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6.6 Herne Bay Pier: A vibrant pier operated by a charitable trust

The pier is owned by Canterbury City Council, and has been leased since 2013 to Herne Bay Pier Trust (HBPT), a charitable organisation that was originally developed by the Council. Although the Council still have input to the Trust, and maintain the substructure, Herne Bay Pier is an excellent example of charitable trust operation of a seaside pier. HBPT have developed a range of attractions and facilities on the pier, including a retail village, catering operations, family funfair rides, events space, and wedding venue.

“There’s only about nine of us trustees plus a few volunteers, none of us get paid so there’s no overheads like that. We just work our socks off and it’s passionate, and we’ve got the town around us, it’s lovely. People love it.”

Doreen Stone, Chairperson, Herne Bay Pier Trust

What Herne Bay Pier does well:

- **Community involvement and engagement:** the pier operation is staffed and managed by enthusiastic volunteers, none of whom are paid. HBPT work in conjunction with other charitable and community organisations and business enterprises within Herne Bay. The pier is viewed as the highest profile regenerating tool for the whole town.
- **Green credentials:** HBPT are exploring the use of wind and wave turbines for the pier to generate electricity. The Trust have recently been awarded £50,000 Coastal Revival Funding to implement solar panels and have a target to achieve an 80% ‘plastic-free pier’ by 2020.
- **Hothouse for business start-ups:** The pier can accommodate over 30 small business start-ups in the beach-hut retail village. Since starting the operation, a number of these small businesses have expanded and moved into larger premises within the town, revitalising the high street. The beach hut retail and catering tenants on the pier currently include a micro-brewery, clothing, homeware, a variety of catering outlets featuring different cuisines, a pet shop, souvenirs shop, and a wedding venue. Huts are rented from HBPT on a monthly or annual basis, with rental during January and February free of charge to provide financial relief during the toughest trading months.
- **Events for the pier and for the town:** The pier run a variety of events throughout the year, mainly focusing on music and children’s events on the pier stage during the summer months, and seasonal events such as Halloween and Christmas ice rink to drive footfall out of season. Herne Bay Pier also acts as a major venue for wider events in the town such as The Herne Bay Festival and the Jazz & Swing Festival.
- **A five-year strategic plan:** during the first plan (2014-2019) the key objectives for HBPT were to ‘reclaim’ and ‘regenerate’ the pier, which they have successfully achieved. As the pier is now full of attractions and facilities, the next strategic plan (2019-2024) will focus on ‘consolidating’ with the ambition to extend the pier in stages to increase its offer. HBPT’s ambition is to reunite the pier with the isolated pier head.

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6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Herne Bay Pier (clockwise from top left): The pier is now at full capacity for attractions and facilities and has a strategic plan to rebuild and extend the pier in phases; the canopy used predominantly as a sheltered outdoor eating space; ‘Beach Hut Weddings’ and pier as a wedding venue; the pier is a popular attraction for families; the pier stage open-air venue for concerts, shows and films; management of the tenants ensuring that retail and catering facilities don’t duplicate their product offering.

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6.7 Mumbles Pier: The most experienced pier operators in the UK

Mumbles Pier has been owned and operated by three generations of the Bollom family since the 1930s. The Bolloms are experienced and well-respected amusement caterers and have chaired a number of national trade organisations. The pier is currently undergoing significant structural repairs, and an upgrade of its product offering. The pier head is occupied by the RNLI lifeboat house which was rebuilt and reopened in 2014. The pier features a bowling alley, amusement arcade, café and upmarket fish restaurant.

“Every pier is different in so many ways, in terms of the sustainability, maintenance, and what it offers, and it really comes down to knowledge of your pier more than anything else.”

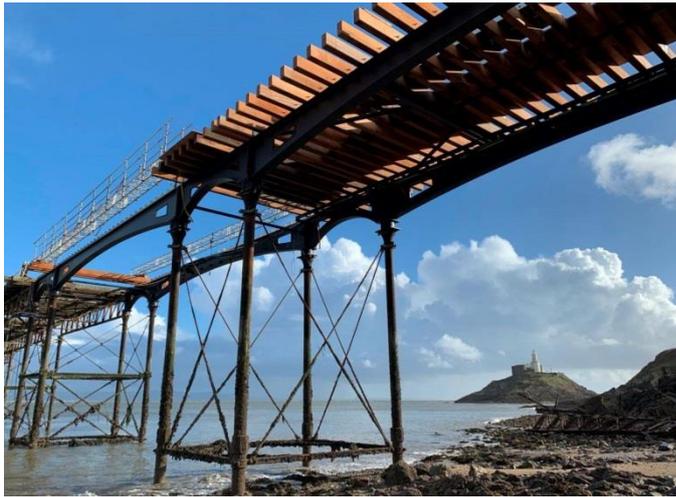
John Bollom, Managing Director, Mumbles Pier

What Mumbles Pier does well:

- Long-term investment in the pier: structural repair and refurbishment works are being funded by the development of the land adjacent to the pier, which will feature 30 residential apartments and a boutique hotel which will be owned and operated by the Bollom family.
- Redesign of the pier substructure: the galvanised latticework steel trusses have been replaced with prefabricated curved steel beams as part of the repair and refurbishment works. This reduces future maintenance requirements and also makes the pier substructure easily accessible under the deck with the use of youngman boards working platforms, reducing the use and associated expense of rope access, providing a long-term, sustainable solution to ongoing maintenance.
- Upgrading product offering for the future: plans to increase and diversify the pier’s attractions and facilities include converting the old boathouse into a wedding venue and champagne and oyster bar, and the current bowling alley into an events and function suite.
- Future-proof arcade offering: conscious of the move towards a cashless society, the amusement arcade currently offers the Mumbles Pier Gamez Card. The card can be credited for use throughout the pier’s facilities and also provides special offers and promotions, such as half-price arcade games during off-peak hours.
- Events and promotions for local residents: recognising the importance of a year-round operation the pier hosts local charity events, children’s competitions and free/discounted meal packages, with a ‘community space’ available to local charitable organisations.
- Working in conjunction with the RNLI: leasing the pier head and access rights to the pier, providing another source of funding for pier maintenance.

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6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



With your **GAMEZCARD** you'll no longer need to fuss and fumble with coins

3 IN 1
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How to play with your GAMEZCARD

It's perfect for all Gamers. When you load up your Gamez card you're purchasing points which can be used on many of our machines throughout the arcade.

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You can use your points to play Gamez for tickets! Once you've won you can either exchange these tickets for a prize at our prize desk or you can save them on your card for a Jackpot Prize from our Winner's Wall!

What you save

Once you have signed up for a Gamez card you will be able to access our Gamez Card Rewards

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Mumbles Pier (clockwise from top left): mid-restoration of the pier substructure, the new steel arches replacing the old lattice-work steel trusses and reducing future maintenance requirements; the pier advertising the benefits of their 'Gamez Card', an aerial view of the pier and headland showing the new RNLI boathouse at the end of the pier and the old boathouse which is to be converted into a new attraction; the proposals for the headland development which will fund the future upkeep of the pier; the Copperfish restaurant and bar which compliments other food and beverage outlets on the pier.

All pictures of 'best practice' piers taken by Anya Chapman, with the exception of pictures of Mumbles Pier which are courtesy of Mumbles Pier, and Herne Bay Pier courtesy of Herne Bay Pier Trust.

6.8 Skegness Pier: Continuously updating product offering

Skegness Pier is operated by UK Piers Ltd, a family business which has owned the pier since 1966. During this time the company have undertaken significant investment in the pier's facilities and attractions. Despite being only a quarter of its original length, Skegness Pier packs in a lot of attractions which are targeted at the whole family. The pier has suffered storm damage, with the last major storm in December 2013 leading to a major refurbishment of the pier's attractions. In 2016 Skegness Pier upgraded the pier roof to enable year-round trading and reduce seasonality.

“We like to have something different each year for people to come and see. In 2017 we opened the escape rooms, last year we opened the beach bar, and now this year we have opened the virtual reality. No doubt there will be something new on the cards for next year.”

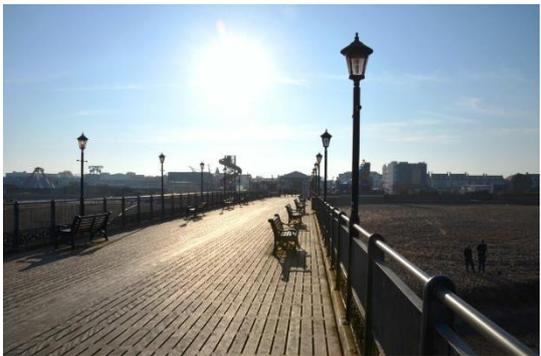
Gabriella Wilkinson, Administration Manager, Skegness Pier/UK Piers Ltd

What Skegness Pier does well:

- Contemporary and cutting-edge attractions: The pier entrance building includes a new virtual reality attraction, the escape rooms, bowling alley, a soft-play facility, licensed beach bar with live entertainment, laser quest facility, and Hollywood bar and grill alongside a substantial amusement arcade. The product offering is aimed at the family market and is refreshed on an annual basis to encourage repeat visits.
- Engaging local residents: investing in the new roof to enable effective operation of the attractions throughout the year. Encouraging repeat custom through the use of the Skegness Pier Loyalty Card. Use of a wide range of party packages (Laser quest, bowling, escape rooms and virtual reality-based packages) to appeal to corporate and kids' markets.
- Effective use of limited space: Skegness Pier features attractions above and below deck. The space under the foreshore entrance building houses attractions including the escape room, laser quest, bowling alley, and beach bar. This provides the pier with multiple access points.
- Strong social media presence: use of competitions and promotions to increase social media reach and engagement. Effective monitoring and expeditious response to online feedback posts such as TripAdvisor.
- Excellent customer service: Skegness Pier has received the TripAdvisor Certificate of Excellence (average rating of 4 out of 5 stars or above over a one-year period) for five consecutive years and qualified for TripAdvisor 'Hall of Fame' status in May 2019.

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6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Skegness Pier (clockwise from top left): The Hologate virtual reality attraction which was installed during 2019; the entrance building to Skegness Pier advertising the pier's attractions; with space at a premium the soft play facility is suspended above the amusement arcade and also acts as advertising space for the pier's other attractions; on deck amusements and rides which are operated by concessionaires; the uncluttered seaward end of the pier deck; free deckchair use offered by one of the concessionaires, Cheryl's Kiosk, which increases visitor dwell time on the pier.

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6.9 Southend Pier: The longest pleasure pier in the world

Sir John Betjeman famously declared that “the pier is Southend, Southend is the pier”, summarising the town’s relationship with its pier. At over 1.3 miles in length, the pier dominates Southend and because of the enormity of the structure it is council owned and subsidised. Southend Borough Council have a revenue budget of £380,000 per annum for the pier, and a planned capital investment over the next five years of £18 million for a proposed new shoreward pavilion (subject to market research and public consultation), replacement of pier train rolling stock & upgrading the pier railway, and substructure maintenance. Southend Pier receives the most local authority funding in the UK.

“It is amazing actually how far a reach the pier has got. The further you go away from Southend, the more the pier rises in prominence. If somebody has heard of Southend it is probably because of the pier.”

James Courtenay, Councillor and Deputy Leader (2011-2019), Southend Borough Council

What Southend Pier does well:

- Recognising the value of the pier to the town: Public sector investment in the pier has been significant, with the long-term vision to make the pier head a destination with a range of family attractions. Being the longest pleasure pier in the world provides Southend with a unique marketing tool as a visitor destination.
- Using the pier as a filming location: The Channel 4 programme Jamie and Jimmy’s Friday Night Feast has been broadcast from a specially constructed ‘café’ at the end of the pier since 2014. Visitor demand to visit the café film set led to the Council opening the facility as an afternoon tea venue in 2019.
- Rising visitor numbers: The development of the pier head attractions since 2012 alongside television coverage has raised annual visitor numbers to the pier from 218,000 in 2010 to 367,000 in 2018, with the council’s long-term ambition to achieve a million visitors per annum.
- Partnerships with charitable and commercial sector organisations: Southend Borough Council lease many of the piers attractions. The pier head houses the RNLI lifeboat station and museum and the pier entrance building features the Southend Pier Museum which is operated by the Southend Pier Museum Foundation Trust. At the pier head there are a number of commercial enterprises operating the pavilion café, beach hut retail, and crazy golf course. The council operate the pier gift shop, trains, and pier toll.
- The Council has developed short, medium and long-term objectives for the pier as part of the wider long-term strategy for Southend. The ‘Southend 2050 roadmap’ was published in 2019 after extensive public consultation.
- Reducing seasonality: seasonal variation of pier toll alongside an events programme including Halloween ‘ghost trains’ and a Santa’s grotto at the pier head. The proposed development of the new landward pavilion will ensure year-round operation, even when the pier head is closed due to inclement weather.

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6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Southend Pier (clockwise from top left): A view of the 1.3 mile Southend pier from the top of pier hill, showing the pier entrance building and the Adventure Island amusement park; Southend Pier museum is housed in the pier entrance building; new ornamental kiosks along the pier deck; the pier head Royal Pavilion and Cultural Centre which opened in 2012 at a cost of £3 million; Jamie and Jimmy's café, the location for the filming of the Channel 4 programme 'Friday Night Feast' and now open as a visitor attraction; the development of new beach huts at the pier head which house a range of retail and catering facilities.

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6.10 Swanage Pier: Securing funding for a sustainable future

Swanage Pier has been owned and operated by the Swanage Pier Trust charity since 1994, when the pier was sold by the town council for the nominal sum of £1. The pier was in a precarious state, with significant damage to the structure, but the Trust began their fundraising activities and successfully secured £1 million to restore the pier, which reopened in 1998. Since then the Trust's form and function has changed as they have moved from saving the structure towards securing a sustainable future for the pier. Swanage Pier Trust has been successful in securing a number of external funding bids in addition to fundraising through crowdfunding, events and plank sponsorship schemes. In 2019 Swanage Pier reopened after significant refurbishment and the conversion of the Marine Villas building into a visitor centre, café, gift shop, meeting and venue hire, and a community radio station at a total cost of £2.2 million which was raised from external funding bids and fundraising activities. The range of facilities now housed on the pier will enable a self-sufficient future for Swanage Pier. The pier currently attracts 125,000 visitors per annum and contributes (directly and indirectly) £2.1 million to the local economy.

“The pier has been restored in its original form for its original purpose... and that is what people fall in love with. Maintaining it in this state is important for generations to come.”

Ben Adeney, Chief Executive, Swanage Pier Trust

What Swanage Pier does well:

- A clear strategic direction: Swanage Pier Trust are focused on maintaining the heritage of the pier and this influences the type of attractions and facilities on the pier. Maintaining the landing stages is key to this vision so that the pier can operate pleasure cruises and retain its original purpose. The pier's mission statement 'to conserve, maintain and enhance the iconic Victorian pier for the benefit of visitors and the local community for generations to come' indicates the importance of the heritage and sustainability of the pier.
- Engaging younger people: As a heritage pier, Swanage Pier's core market are the older generation. However, the Trust aims to target young people and children through a variety of initiatives. The Purbeck Coast community radio station encourages young people to become involved. The Trust also provides a range of educational resources and facilities, including teaching spaces at the pier, a learning and resources officer, pier tours for schools, and free learning resource packs.
- Integrated marketing: Swanage Pier links to other heritage attractions within the local area, such as The Swanage Railway, Durlston Country Park, and Swanage Museum in cross-promotional activities. The 'Durlston Explorer' bus route effectively packages the attractions into a coherent visitor experience.
- Engaging and retaining volunteer staff: Swanage Pier Trust employ a volunteer support officer to liaise with volunteers, ensure clear communication, training, and to organise events and activities for the pier volunteers. Volunteer staffing at the pier accounts for approximately £90,000 worth of workforce hours per annum. Volunteer uniforms are also provided, free of charge, through sponsorship from City Cruises.

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6. BEST PRACTICE PIERS: THE TOP TEN SEASIDE PLEASURE PIERS



Swanage Pier (clockwise from top left): The new Purbeck Coast studio housed within the Marine Villas, broadcasting community radio from August 2019; the original toll booth at the entrance to the pier, advertising the pier's link with City Cruises which sail from the pier's landing stage; the new Swanage Pier visitor centre and gift shop which opened in 2019; the 'Divers Down' diving school business located on the pier; the pier head and landing stage, with plank sponsorship plaques displayed on the pier deck; the 1859 Pier Café and Bistro, opened in 2019 as part of the £2.2 million refurbishment of the pier and Marine Villas building.

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7. Pier sustainability toolkit

The pier sustainability toolkits have been compiled from a combination of sources. Analysis of the pier review database of all 61 seaside piers, alongside interviews with the ten best practice pier owners provided insight into the management, operation and investment practices alongside the key challenges faced by British seaside piers. In addition, best practice management principles from the wider tourism and leisure industries have informed the development of the toolkits.

The toolkits are tailored to the pier type: Seaside Special; 21st Century Innovator; and Heritage piers. The toolkits outline a range of management techniques to ensure the long-term sustainability of these piers, covering the following: Ownership and operational models; strategic mission and vision; the most appropriate forms of revenue generation; marketing and promotion techniques; human resource management; suitable investment priorities; overcoming, minimising or planning for key challenges; and where monitoring and evaluation is required.

Pier Sustainability Toolkit: Seaside Special Piers

Sustainable ownership/operational models:

Commercial sector ownership and operation

Partnership: public sector ownership with commercial sector operation/ facilities

Strategic mission/vision:

Tempered profit maximisation

Organisational objectives based on financial sustainability

Key performance indicators: Return on investment; visitor numbers; visitor satisfaction

Medium-term vision: 5 to 10 years

Revenue generation:

Multiple attractions and facilities aimed at core family market for visitors and local residents

Minimising seasonality with indoor attractions and facilities

Leasing of specialist attractions and facilities

Pier events and venue hire

Marketing and promotion:

Discounts and promotions for low season targeted at local residents

Use of PR through relatable figurehead and/or pier mascot with CSR focus

Consistent use of social media for relationship marketing, targeted competitions and promotions

Use of inhouse branding, licensed evergreen IP, or sponsorship

Human resource management:

Minimising seasonality to maintain skilled and experienced employees and reduce seasonal recruitment costs

Inhouse pier maintenance team + specialist contractors for major refurbishments

Retention through staff training and development with opportunities for internal promotion

Investment priorities:

Annual budget for pier maintenance and structural surveys

New/upgraded flagship attractions on a quadrennial cycle to increase repeat custom, marketing opportunities, and visitor numbers

Multiple attractions and facilities to appeal to all target markets

Overcoming challenges:

Effective business continuity plans and systems – may reduce insurance premiums

Capital reserves in budget for unforeseen pier maintenance or repairs

Partnerships with third sector for external funding bids for significant repair of pier substructure

Monitoring and evaluation:

Monitoring latest industry and consumer trends

Annual monitoring and evaluation of KPIs: visitor numbers, spend per head, customer satisfaction, EBITDA, Marketing activity ROI, employee satisfaction/turnover

Pier structural surveys

Pier Sustainability Toolkit: 21st Century Innovator Piers

Sustainable ownership/operational models:

Commercial sector ownership and operation

Partnership: public sector ownership with trust and/or commercial sector operation/ facilities

Strategic mission/vision:

Tempered profit maximisation

Organisational objectives based on financial sustainability often combined with wider socio-economic benefits

Key performance indicators: Return on investment, visitor numbers, community benefits

Long-term vision: 15 to 20 years

Revenue generation:

Multiple attractions and facilities aimed at specific/niche visitor markets and/or local community

Minimising seasonality with indoor attractions and facilities

Pier events and venue hire

Offering a USP in resort/ from competitor piers

Marketing and promotion:

Clear and distinctive target markets/ niche markets

Events and promotions during low season targeted at local community

Distinctive inhouse branding of flagship attractions

Effective relationship marketing via social media and use of PR to raise awareness of CSR activities

Human resource management:

Core team of paid employees supplemented by volunteers (where appropriate)

Inhouse events management and marketing teams

Inhouse pier maintenance team + specialist contractors for major refurbishments

Attractions sector consultants for major developments/ new attractions

Investment priorities:

Annual budget for pier maintenance and structural surveys

Maintain core flagship attraction/USP and upgrading of secondary attractions/facilities (complementary to core offer) on a biennial basis

Quality and innovative products and attractions to increase repeat custom

Overcoming challenges:

Capital reserves in budget for unforeseen pier maintenance or repairs

Providing long-term leases to commercial or third sector operators/ attraction providers

Partnerships with third sector for external funding bids for significant repair of pier substructure

Effective crisis management plans and business continuity systems

Monitoring and evaluation:

Annual monitoring and evaluation of KPIs: EBITDA, visitor satisfaction, CSR objectives, visitor numbers/seasonality reduction, employee retention & satisfaction

Annual market research and/or public consultation events

Pier structural surveys

Pier Sustainability Toolkit: Heritage Piers

Sustainable ownership/operational models:

Public sector ownership and operation

Partnership: public sector ownership with trust and/or commercial sector operation/ facilities

Third sector/ trust ownership and operation

Partnership: Third sector/ trust ownership and operation with commercial sector facilities

Strategic mission/vision:

Social welfare maximisation strategy

Organisational objectives based on preservation of heritage

Key performance indicators: Benefits to local community, environment and economy

Long-term vision: 15 to 20 years

Revenue generation:

Leasing of pier operation/ facilities/ attractions to commercial sector and/or third sector

Operation of multi-purpose pier visitor centre

Pier events and venue hire

Modest pier toll

Marketing and promotion:

Encouraging local community engagement through low season free events and activities

Pier a central feature of wider resort marketing strategies for the visitor market

Integrated marketing with other heritage attractions

Appropriate commercial sponsorship suitable for heritage pier

Human resource management:

Core management team with a range of skills/ expertise including fundraising/ bid writing, project management, marketing and operations management alongside engineering/ maintenance skills

Volunteers to fill roles such as customer facing roles, social media, and basic maintenance

Specialist contractors for pier maintenance and restoration

Investment priorities:

Ringfencing of budget for annual maintenance and structural surveys

Development/ redevelopment within planning or listed status guidelines

All-weather multipurpose space/ visitor centre at pier's entrance

Overcoming challenges:

Prioritising revenue and capital spend on pier in an era of public sector funding cuts

Providing long-term leases to commercial or third sector operators/ attraction providers

Developing and maintaining impetus and enthusiasm among third sector owners and operators

Monitoring and evaluation:

Monitoring of visitor numbers and average spend per head

Key performance indicators: annual monitoring and evaluation

Annual market research and/or public consultation events

Pier structural surveys

8. Conclusions: Sustainable seaside pleasure piers

There are currently 61 seaside pleasure piers around the British coast, many of which are circa 150 years old. This inevitably raises the question of the long-term sustainability of these iconic landmarks, especially as they now require increased levels of maintenance and face numerous risks and threats. The growing concerns around climate change, predicted rising sea levels and storm surges mean that these structures will face further challenges in the future.

Nevertheless, the toolkit has highlighted ten best practice piers which demonstrate adaptability, resilience, and the wider importance of these piers to the resorts in which they are located. The toolkits, tailored around three different types of pier, provide a roadmap to ensure the future sustainability of these structures. Seaside piers are landmark attractions for seaside resorts and an important facet of British cultural identity.

8.1 Recommendations

1. Clear strategic direction: Pier owners, regardless of sector, should implement a strategic planning cycle for their piers. Piers in the commercial sector should operate a 5-year strategic plan with realistic and achievable targets and objectives. In the public sector Councils should develop longer-term strategies of ten to fifteen years for their piers, perhaps as part of wider town/city plans. Piers operating in the third sector should consider a series of 5-year plans with a longer-term objective for the overall direction and development of the pier.
2. Scenario planning and crisis management: Pier owners are currently not considering the potential longer-term risks to their structures from climate change. Business continuity and crisis management plans should be developed as a matter of urgency for all piers.
3. Long-term partnerships: Piers that operate under public ownership should extend operations or facility/attraction leases to commercial enterprises on the pier. Short-term leases discourage commercial investment in the pier due to time constraints on return on investment.
4. Funding for piers: There are a number of external funding bodies that have generously supported piers in the public and third sectors. However, funding opportunities for private/commercial sector piers remains limited. Due to the significant cost of structural maintenance and the wider socio-economic benefits of piers, it is recommended that business rates for piers be reduced and the monies saved ringfenced for structural maintenance. Reduction in rateable value would enable private/commercial sector piers to further invest in the maintenance and repair ensuring the sustainability of the pier.
5. Pier insurance: High insurance premiums due to the risks associated with piers result in very few piers being insured for full loss. It is recommended that a code of practice be developed by the insurance sector in conjunction with pier owners in order to reduce risk and lower premiums. The code of practice should focus on steps to minimise security risks, fire, storm damage, alongside effective emergency response plans.

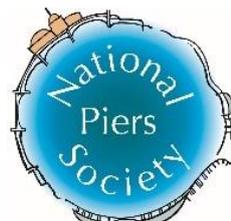
6. **Monitoring and evaluation:** Most piers do not have quantifiable visitor numbers and/or spend per head figures. Pier owners and operators should install footfall monitors/cameras to ascertain annual visitor numbers and seasonal variations. Market research should be undertaken to further comprehend market characteristics, consumer behaviour and satisfaction levels. Informed management and investment decisions can then be made on this basis.
7. **Technological and engineering developments:** Research and development of effective and affordable storm surge wave dispersal techniques is required to mitigate the risk of storm damage to piers. New designs and materials for pier substructures should be investigated to reduce maintenance costs and requirements.
8. **Future pier functions:** As piers become increasingly costly to maintain, the function of piers should adapt and evolve. Investigation into the potential for piers to generate renewable energy through solar, wind, or wave power should be pursued, enabling the piers of the future to be multipurpose sustainable structures.

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