Economic Plan 2018-2021 Promenade to Port Coastal Community Team

March 2019

Version 1.1

Contents

1. Executive Summary

Morecambe and Heysham in the Promenade to Port Coastal Community Team (CCT) area have an outstanding coastal environment with spectacular views of the Lake District fells and fantastic sunsets. As former seaside resort, it has a rich heritage that continues today and tourism remains an important part of the economy.

Aerial photo of Heysham and Morecambe looking north

The recent announcement that Morecambe's Eden Project feasibility study has been successful and is progressing to design and planning has given the town a boost and a renewed confidence. The wider district has strong economic prospects for growth and much of this will occur on business and industrial estates adjacent to the CCT area.

The Promenade to Port Economic Plan focusses upon addressing five themes:

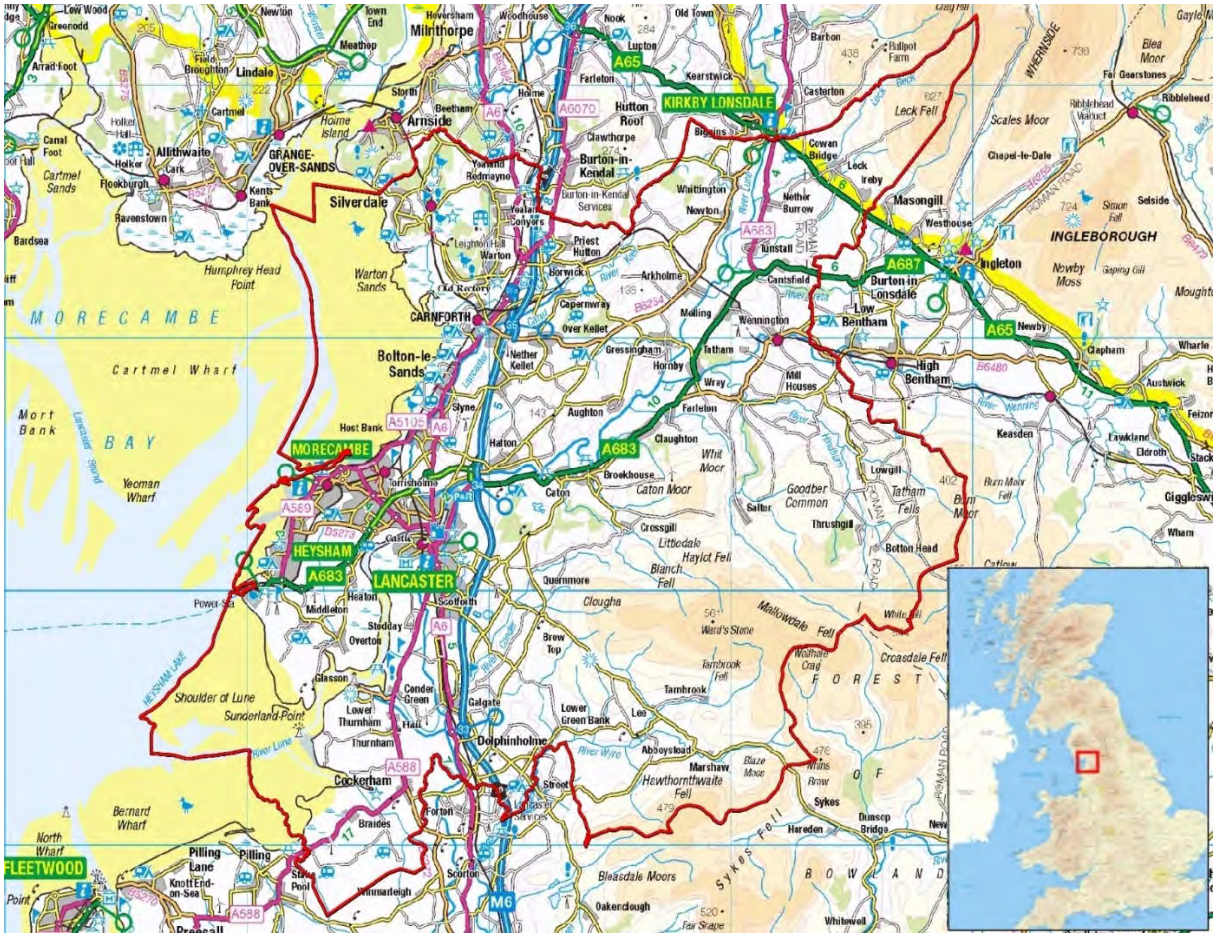
- **Boost the visitor economy** – Developing ways to maximise, diversify and improve the offer.
- **Telling our story** – Launch new marketing, branding and promotion Morecambe's unique offer.
- **Maximise the potential for arts and creative industries** – Build on Morecambe's reputation as an artist's town focussing on growth sectors of the arts and creative industries.
- **Refurbishment and re-use of prominent derelict and underused buildings** – Develop creative property solutions to the challenge of low demand/values and high costs.
- **Employment, Skills and Training** – Support and facilitate community access to existing and new economic opportunities through training, apprenticeships and other support.

2. Key Issues

- Calendar of festivals and events
- Outstanding natural assets
- Renewed confidence in Morecambe
- High population density – *city-like*
- Ageing older population
- Significant deprived communities
- High unemployment
- Low skills and educational attainment

3. Local area

Promenade to Port Coast Communities Team (CCT) area is located in Morecambe in the Lancaster City Council administrative area and is the most northerly Lancashire district sharing a boundary with Cumbria and North Yorkshire.



Plan showing location of Morecambe and Heysham in UK and the wider Lancaster district

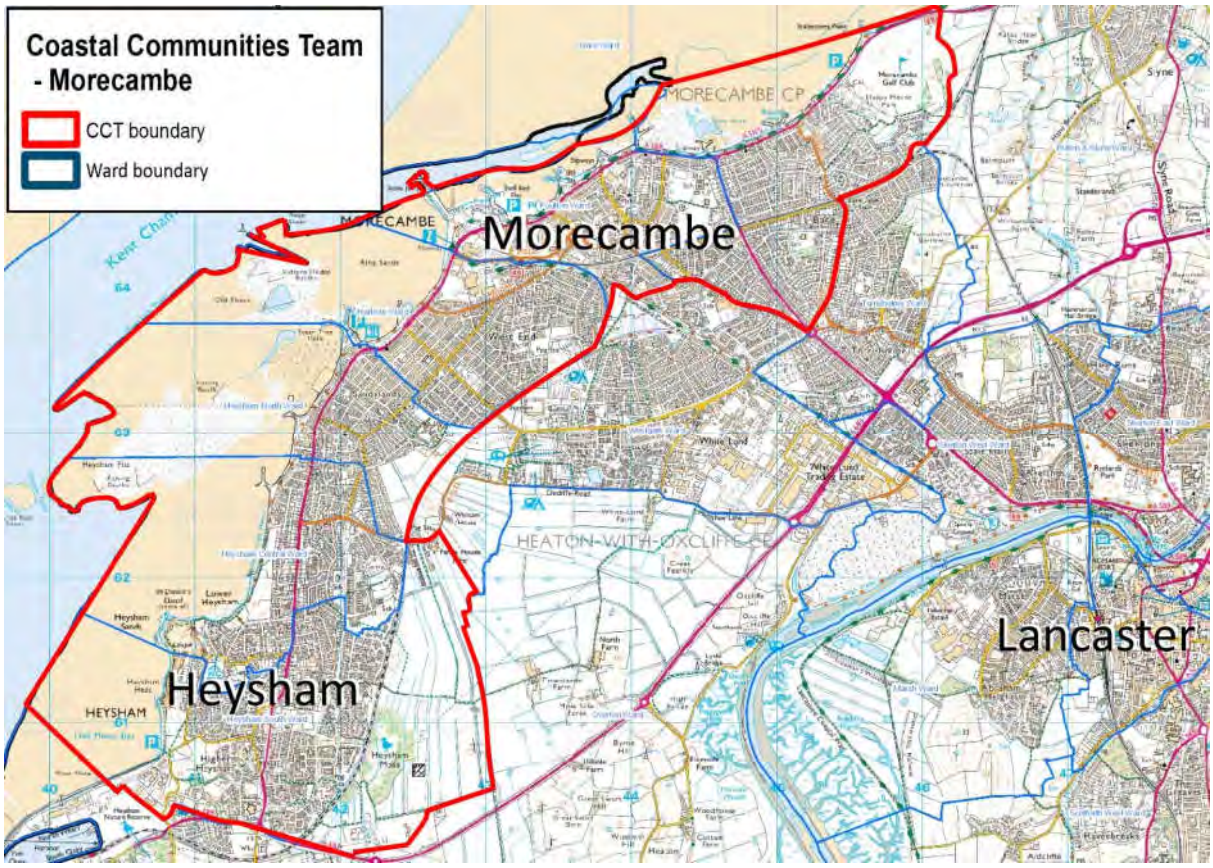
The CCT area includes six coastal wards; Bare, Poulton, Harbour, Heysham North, Heysham Central and Heysham South.

Morecambe's heritage relates directly to its coastal location, with the original settlement of Poulton being a fishing village that with the advent of the railway became a seaside holiday resort. The railway connected Morecambe to northern industrial towns brining thousands of holidaymakers and led to a Victorian and Edwardian development boom in the construction of guesthouses, piers, theatres, funfairs, parks and promenades. The good times for Morecambe lasted into the 1960s, but with the growth of foreign holidays the town struggled to adapt to the economic change. Gradually through the 1970s to 80s the town went from boom to bust with attractions closing down and the Midland Hotel failing into decline and being painted pink. With failing numbers of tourists many guesthouses filled their rooms with tenants, incrementally turning into houses of multiple occupation, and this coincided with national policy changes such as care in the community that saw many vulnerable people relocated to seaside towns like Morecambe due to the ready availability of cheap accommodation. The town experienced significant negative press including the unfortunate accolade of Most Depressed Town based on the number of prescriptions of anti-depressants.

From the 1990s there has been incremental positive change from both the market and regeneration project successes:

- The iconic Midland Hotel was restored to its former glory as Morecambe's premiere hotel.
- Investment in regeneration of the historic seaside housing areas of Poulton and the West End.
- Public art and public realm improvements along the length of the prommenade.

This adaptation has enabled Morecambe's natural assets to become the focus for its seaside economy. There is a growing range of festivals and events capitalising on the day-trip visitor market. Public art commissions have really added a positive feel to the town and alongside this there is a growing arts community and industry.



Plan showing the Promenade to Port Coastal Communities Team Area and the ward boundaries

The central majority of the Promenade to Port area contains some of the district's most deprived communities and is in sharp contrast to the more prosperous areas of Bare and parts of Heysham. Morecambe's ready supply affordable housing serves not just the Lancaster district but the wider Bay area and rural hinterland where property prices are far higher. Northwest average house price is £187,134 compared to the CCT average that is £59,063 lower at £128,070.

Morecambe Bay is a designated Special Area of Conservation and a protected environment. The views from Morecambe across the bay of the UNESCO World Heritage Lake District National Park are awe inspiring.

The new Heysham Gateway M6 link road has greatly reduced journey times for residents and business. The positive impact for Heysham Port cannot be overstated, with direct freight links to both Ireland and the Isle of Man. The M6 Link Road has provided a boost to commercial development opportunities.

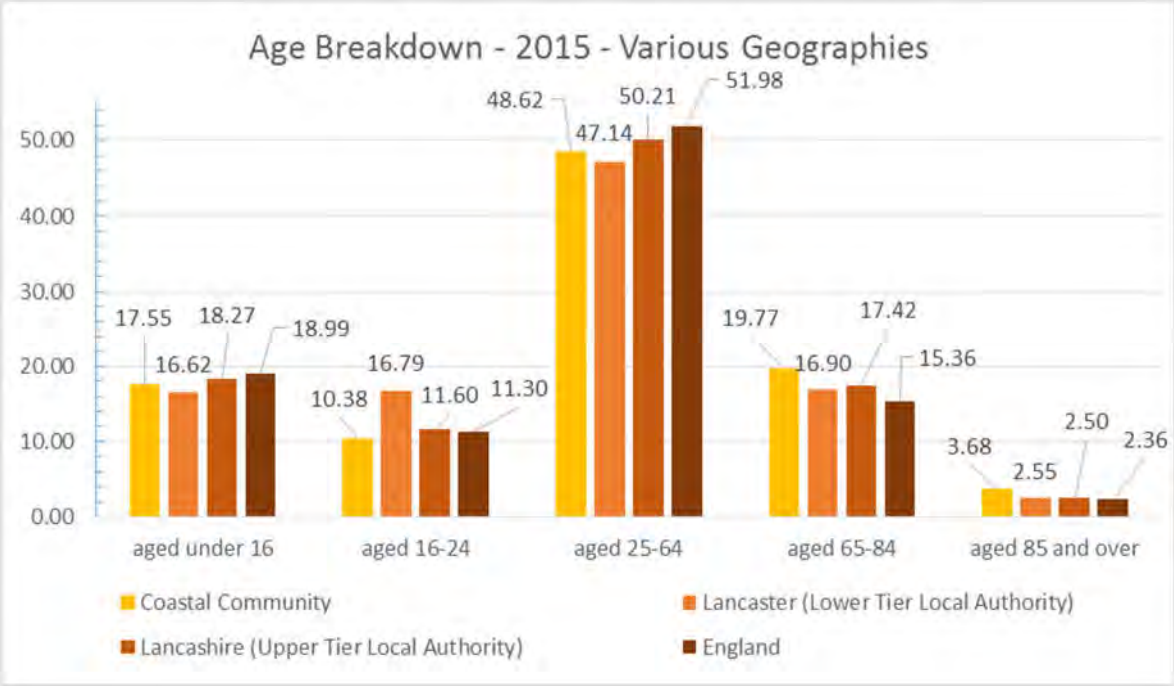
The CCT area is adjacent to the district's largest employment centre, White Lund industrial estate, as well as other major employment sites in Heysham; the port, power station and industrial estates.

Morecambe Town Centre is located in Poulton Ward and the traditional retail area has experienced the challenge from large edge of centre retailers on Central Drive that offer free parking. There are smaller local shopping areas in each of the other five wards.

4. Community

The CCT area has a population of 38,377 and represents 27% of the district's population. The following statistics highlight the key community issues for the CCT area:

- Population is older in composition than both the Lancaster and England averages;
- Is significantly less ethnically diverse than both the Lancaster and the England average
- Has significantly greater levels of poor health compared to Lancaster district;
- Poulton, Harbour, Heysham North and Heysham Central wards all show significantly worse life expectancy for both males and females than the England average;
- Life expectancy in Heysham South and Bare wards is equal to the England average;
- Population density is high, particularly in the central areas of older terraced housing and comparable to major inner city areas;
- In pockets of central Poulton, Harbour and Heysham wards there are clusters of Polish communities at a neighbourhood level of 8-15% with one area up to 20%.



5. Economy

Only a partial suite of economic data is available at a CCT area level and district data has been used and extrapolated in some instances. District data is considered indicative given that over a 27% of the population live there. However, the CCT has some the district's most deprived communities and some of the more positive district level statistics are not reflected in the CCT area, particularly the relatively lower levels of employment, wealth and education.

CACI data uses a measure of attractiveness for retail centres and compares the rank score with other comparable areas. Data for Morecambe indicates that it is less attractive than similar comparator towns and is at the lower end of the range in expected terms. Comparator towns of Bridlington and Redcar were selected from the same category, large regional towns that are considered to be statistical neighbours. One principal difference to the comparator towns is that Morecambe has two

close neighbouring centres, Lancaster and Kendal, that are more attractive and attract significant spend from the Morecambe catchment areas. Slightly under half the spending of residents in the primary catchment area being spent outside the Morecambe centre suggesting either the centre does not offer what people need or that there are more attractive areas to shop in elsewhere. The CACI dataset and more detailed discussion are in Appended B.

The measure for economic activity Gross Value Added for Lancaster District 2015-2017 provides mixed results, with growth at differing rates across sectors. The district performs above the UK average for Public Services, Utilities, Extraction / Mining Industries, Education and Real Estate. However, Lancaster District lagged behind the North West in other areas, such as Manufacturing, Finance, Insurance and Information and Communications.

The CCT area economy reflects the average distribution of industries in Lancaster as a whole closely but there is significantly less employment in the Education sector than for the district average, this is almost certainly because the Universities have limited presence in the coastal community area.

There is a little more manufacturing in the CCT area, though there are two wards, Bare and Heysham North where the proportion of manufacturing is quite a lot higher than the district average.

The number of employee jobs grew from 52,000 to 55,000 between 2009 and 2015, representing a 5.8% growth, compared to 2.3% for Lancashire and 5.8% for England. Unemployment in Lancaster district has fallen from 7.4% in 2004 to 4.5% in 2017. This is in sharp contrast to the Universal Credit claimant count for April 2018 that indicates that Heysham North, Poulton and Harbour have more than double the proportion of claimants than Lancaster district and three to four times the National average.

With regard to occupation Harbour, Poulton and Heysham North have higher levels of unskilled workers than the average whilst Bare and Heysham South have lower levels of unskilled workers. A further clear difference is the general lack of professional level occupations which is most obvious in Heysham North. In general the CCT area has higher employment levels in lower level jobs, though Bare has a notably higher level of managers, directors and senior officials.

The Lancaster District Economic Prospects report (Turley 2017) highlighted the good prospects for the economy and noted five main strengths, of which three are in or adjacent to the CCT area:

- The Port of Heysham, as an important infrastructure asset linking the North West region to Ireland and the Isle of Man with opportunities for growth;
- The district's role as a leading energy centre for generation and supply with opportunities for growth and specialisation in areas such as offshore wind;
- New infrastructure – Heysham-M6 Link Road and National Grid connection to West Cumbria.

The prospects for economic growth were made prior to the Eden Project North proposals going public, and this obviously has great potential for economic growth in Morecambe. An initial feasibility study has been completed successfully and funding support is now being sought. The estimated £100M investment in developing a world class attraction would provide a huge economic stimulus, boosting investor confidence in Morecambe and has been hailed a 'game changer'. The project has strong support from a range of partners including the Northern Powerhouse, Lancashire Local Enterprise Partnership, Lancaster City Council, Lancashire County Council and Lancaster University.

The CCT has relatively deep deprivation compared to the rest of the district and England. It contains some of the least affluent areas in the district. Issues with health, wealth, housing, education, crime and employment are significant. There are, however parts of the area that are less deprived so it would not be correct to conclude that the whole of the coastal area is deeply deprived. However just

short of 60% of the CCT population live in areas that are amongst the most deprived 30% in the country.

- A quarter of the CCT population are amongst the 10% most deprived in England;
- Heysham North is the most deprived ward in the district and ranks 80th in England;
- Poulton, Harbour and Heysham North wards are some of the most income deprived in England;
- Morecambe Bay Foodbank fulfilled 2,356 vouchers issued by support agencies to Lancaster district residents and 72% of these were to residents of the CCT. 62% of all vouchers were to residents of Poulton, Harbour and Heysham North;
- A significant proportion of residents in some wards are claiming housing benefits;
- Crime is an issue in much of the coastal community area;
- Highlighting the very large gap between least and most deprived areas in the CCT. Bare ward is the least income deprived, ranking 23,530 out of 32,837 and Heysham North ranks 453;
- Harbour, Poulton and Heysham North have higher levels of unskilled workers than the average whilst Bare and Heysham South have lower levels of unskilled workers.
- Unemployment is significantly higher than average and this is most marked in Heysham North and Harbour wards;
- Most wards have a higher proportion of residents who have no qualifications than the Lancaster District Average;
- Children are largely underachieving at both 11 years old and at 16;
- Bare and Heysham South exceed both the Lancaster and England average for Key Stage 2. However, Poulton, Harbour, Heysham North and Heysham Central are below both the Lancaster and England average;
- Most wards are not reaching neither the Lancaster average or the somewhat lower English average at Key Stage 4, though Bare exceeds both by some margin;
- The CCT has low levels of internet engagement for information, shopping, social and leisure.

6. Related initiatives

A number of significant organisations and initiatives is improving the economic prospects of the Promenade to Port CCT area:

Heysham Gateway – A Lancaster City Council led major initiative that aims to redevelop 250 acres of brownfield land to create 2 million square feet of employment space, 5,000 jobs, £300 million inward investment, improved infrastructure and increased port capacity.

Morecambe Area Action Plan – A Lancaster City Council planning document that sets out and guides development and regeneration in the central area of Morecambe. The plans have been subject to wide consultation and will support economic uplift and private sector investment.

Eden Project North – The recently announced Eden for the North proposal has enormous potential for Morecambe. Funding is now being sought to realise the project making it a medium term prospect.

Morecambe BID – The town centre in Morecambe has an active Business Improvement District that supports and promotes traders, hoteliers and festivals.

Morecambe Town Council and Heysham Neighbourhood Council – The Town and Neighbourhood Councils are developing neighbourhood plans, programmes of festivals and events and have strong community links.

More Music – A community music and education charity based in the West End for Morecambe. It runs a year round programme of participatory activity, for people of all ages and all backgrounds, a

venue that is part a national touring network and produces a series of seasonal festivals, including Catch the Wind.

West End Million – A Big Lottery initiative to develop community capacity and programmes in one of the UK's most deprived areas with the aim of ensuring access to lottery funding. The community partnership has recently approved its three year plan and is now ready to deliver on the community's ambitions.

Morecambe Bay Partnership – Championing the wider Morecambe Bay area focussing on links between the economy and the areas heritage and natural environment. It is heading up a complementary CCT which will have strong affinities and relationship with Promenade to Port.

Go Morecambe – A local community Interest Company committed to working for Morecambe to help raise regeneration, aspiration and stimulate economic growth. The company have assisted with and helped develop key festivals in the area.

Morecambe Artist Colony (MAC) – Another local not-for-profit group of local artists and creatives, passionate about using art for the regeneration of our town.

Exchange Creative Community Interest Company – A West End community arts social enterprise and part of a growing sector of community arts businesses. Feasibility work to asses if it is economic to refurbish the derelict Trinity Methodist Church to provide arts businesses space is currently underway.

Lancaster District CVS – Provides guidance, co-ordination, representation and development support to the voluntary community faith and social enterprise sector across the Lancaster District and is been the main voluntary umbrella organisation for the CCT area.

Morecambe Bay CCT – Aims to maximise, improve and celebrate the areas tourism, liveability and heritage

Bays of Barrow & Furness Peninsula CCT – Aims to connect people of Barrow with the natural beauty of the borough and is delivering green infrastructure projects to address complex issues.

Fleetwood CCT – Aims to improve the centre of Fleetwood by connecting communities, shoppers and visitors with the historic town, its retail heartland and coastline.

Cleveley's CCT – Working with retail businesses in Cleveleys to connect with communities, shoppers and visitors.

Morecambe was successful in securing Coastal Revival Funding in 2017. This funded significant improvements to the Dome arena site on the promenade as space for festivals and events and for general amenity through access and environmental improvements and public art commissions.

All the initiatives currently engage on various levels and it is imperative that no opportunities are lost and each initiative is mutually supportive and complementary. Promenade to Port will cement links, embed strategic thinking within local groups, and reveal local issues to strategic bodies. There are common themes and issues and it makes sense to come together in partnership to share knowledge, add value and address these together.

7. Ambition

Morecambe and Heysham is a great place on the coast that has been adapting to the changing needs of visitors and the community. Local businesses, hoteliers and restaurants, and creative artists, have made the area more attractive and vibrant, the council has been delivering an action plan of improvements to the promenade and town centre, and the new M6 link road brings new opportunities and confidence. The Eden Project north is a massive boost for the town and the

successful completion of the feasibility study has enabled fund raising to ramp up. Building on this and looking to the future the Promenade to Port CCT aims to:

- Boost the visitor economy and improve the visitor experience;
- Develop new indoor all weather attractions;
- Develop and support new outdoor activities and sports facilities;
- Promote and grow the Uniquely Morecambe brand and tell our story;
- Make festivals and events better and more sustainable through support and development;
- Integrate the town centre and seafront to improve visitor experience and support businesses;
- Improve the amenity of the town by bringing prominent buildings back into use;
- Remove barriers to economic activity through development of employment skills and training;
- Grow and develop emerging arts and creative industries sector.

8. Needs of the community and intentions to meet them

The Promenade to Port Economic Plan focuses on five themes:

Boost the visitor economy – Tourism is still a key aspect of Morecambe and its economy and developing ways to maximise, diversify and improve the offer were highlighted as being very important. Developing and promoting tourism further through targeted actions including:

- New all-weather indoor attractions - The climate in Morecambe can make enjoying the fantastic natural assets challenging and through the consultation for this strategy it was recognised that the provision of a better offer for all weather attractions. This was prior to the announcement of the potential for the Eden Project North to be developed in Morecambe which would exceed expectations. The potential for this to build confidence in investing in Morecambe is significant and a boost the visitor economy, particularly in increasing the number of overnight staying visitors.
- Support and develop festivals and events – The success of festivals and events in energising Morecambe and giving the town a buzz should be capitalised on. There is potential to improve the current offer and capitalise on the town's existing strengths. In addition to direct economic benefits, festivals and events promote a highly marketable positive image of Morecambe.
- Developing outdoor activities offer – Beach sports bring both visitors and animate the seafront with activity that brings interest and life to Morecambe. There is potential for outdoor activities including sailing, kite-surfing, fishing etc to be developed further and promoted to broaden Morecambe's appeal to both participants and spectators.
- Better connecting the seafront to the town – To maximise the benefit to the town from visitors the connection between the seafront and the town needs to be improved, as there are too many barriers that hinder movement.

Telling our story – To improve the perception of Morecambe through marketing and branding that promotes Morecambe's unique offer and character. Generating positive marketing for Morecambe is important to address the out-dated negative view of the town. For the CCT team, it is about communicating the compelling story of our festivals, outdoor activities, and sizzling offer.

Maximise the potential for arts and creative industries – Morecambe is developing a reputation as an artist's town. The arts and creative industries are an economic growth sector. New economic opportunities within the centre of the CCT through the support of art and creative industry businesses not only bring economic benefits, but also a positive buzz both on the street and online. Re-purposing empty shops into mixed use workshop studio retail spaces animates struggling shopping streets by adding colour and interest.

Refurbishment and re-use of prominent derelict and underused buildings – The challenging economics of low demand and low property values mean many older buildings are not economic to refurbish and these can have a very negative impact on the town. Concerted action as a private, public and community partnership to use all resources and tools to bring about positive change. The CCT will facilitate this.

Employment, Skills and Training – A significant challenge to the CCT area is to support and facilitate the community to gain access to existing and new economic opportunities, this is especially relevant in the central areas of the CCT where statistics show high unemployment, low wage employment and low qualifications. This should include the development of apprenticeships, training and employment opportunities linked to the specific industries in the area. The local Employment Skills Group will investigate other targeted actions to eliminate barriers to economic activity.

9. SWOT Analysis

Strengths	Weaknesses
• Outstanding seaside environment with views across the Bay to the Lake District • Strategic energy hub for generation & distribution • Proximity of strategic employment sites & future economic development sites • High quality blue flag award beaches • Vibrant calendar of festivals & events • Excellent road, rail & sea transport links • Renewed confidence in town due to successful regeneration projects and Eden Project potential • Historic Heysham village centre & Viking settlement • Popular day trip destination 3.3M day trips & 1.3M staying nights every year • Town's engaging & attractive public art • Resident shopping catchment 32K, tourist visitors increase this by equivalent of 29K	• Limited range of big retailers & specialist shops • Limited 'all weather' leisure & visitor attractions • Failure to maximise visitor spend with limited quality eating establishments & evening venues • Cultural offer is poor in traditional terms • Dispersed Morecambe town centre with poor links to Central Promenade • Pockets of significant retail vacancies • Negative impact of derelict & under-used buildings • Central CCT area exhibits deep deprivation • Rail link is only a branch line to Lancaster • Low skills base limits local access to existing & new employment opportunities • Poor quality street environment away from promenade, especially central area • Seasonality of attractions, events & jobs
Opportunities	**Threats**
• Eden Project North has enormous potential for positive transformational change • Outstanding coastal environment & scenery of Morecambe Bay & the Lake District • Development investment planned for Midland Hotel, Frontierland site & Arndale • Capitalise on growing arts & creative industry sectors – the wider cultural offer • Improvements in hotel accommodation.	• Proximity of competing more attractive retail centres in Lancaster & Kendal • Competing retail nodes within the centre of Morecambe • Focus of government funding on 'growth' sectors, not opportunities in tourism, leisure & retail • Uncertain future for nuclear industry • Failure to upskill local people to fill vacancies within local employment opportunities

• Increased business engagement with new Morecambe BID • Redefine Morecambe as a festival town with infrastructure & facilities to secure large events • Increase shopping catchment to 48K and reduce leakage to Lancaster & Kendal • Encourage increased dwell periods & longer stays • Local growth in logistics/energy/high technology sectors in new &existing employment areas • Marine & other leisure development opportunities • Housing & property reasonable prices in comparison to national averages	• Displacement of major stores leaves vacant property in prominent locations • Lack of engagement & ambition from local 'lifestyle' businesses • Increased online retail competition • Competition from neighbouring centres entertainment market threatens Morecambe's current entertainment offer • Increasing attraction of poor quality housing due to changes in benefits & pressures in other towns • Low property values can make refurbishment, redevelopment and new build uneconomic • Ability & resources to promote Morecambe Bay in a crowded competitive national market

10. Key projects and Actions

The key priorities and/or bodies of work for the CCT are:

1. Eden Project North – transformational project with huge potential;
2. Support and develop festivals and events – building on strong programme of festivals and events with both physical improvements and learning and development;
3. Better connecting the seafront to the town – highways public realm project to reduce physical barriers between seafront and town through pedestrianisation and detuning of carriageway;
4. Maximise the potential for arts and creative industries – build and capitalise on growing artists town and the economic benefits of a growth industry;
5. Developing outdoor activities offer – support and develop outdoor activities including sailing, kite-surfing, fishing and other seaside sports;
6. Telling our story – marketing, branding and promotion of Morecambe's unique offer and character;
7. Refurbishment and re-use of prominent derelict and underused buildings – addressing detrimental impact of large underused buildings by bringing them back into economic use;
8. Develop strategies to assist CCT residents to benefit from economic growth – district's potential for economic growth is strong, but some of the CCT community are least likely to benefit.

For each key priority project the tables below provide a high level description of project interventions that shows the CCT role, indicative partners, funding, economic benefits, timescales, and actions.

Key project 1	**Eden Project North**
Description	Development off national indoor tourist attraction at Bay arena site. Project has successfully completed feasibility work and is progressing design and planning. The project has strong political and local support with financial support from the City Council, Lancashire County Council, university of Lancaster, Lancashire Economic Partnership and Government. Eden has the potential to bolster Morecambe's offer and address the shortage of quality all-weather attractions.
Delivery partners	Eden Project, Lancaster City Council, Lancaster University, Lancashire County Council, LEP and Government.

Timescale	Positive outcome to initial feasibility. Design and planning stage now underway. The project is a long-term prospect +5 years.
CCT role	Partner liaison.
Funding	TBC contributions from partners for feasibility. Estimated total cost £100M.
Economic benefits	Significant national attraction will increase visitor numbers, duration of stay and spend. It will also build confidence and could pump prime investment and development.
Performance measures	Increased visitor numbers Increased length of visitor stays Increased tourist spend Increased attendance numbers at festivals Reduction in levels of deprivation in CCT e.g. unemployment Number of new indoor attractions Vacant and derelict buildings brought back into use
Links with other initiatives	2. Support and develop festival and events 3. Better connecting the seafront to town 8. Develop strategies to assist local people to benefit from economic growth
Short Term Actions	CCT will support and promote Eden Project for Morecambe to assist wider economic strategies and design/planning work.
Comments	If successful Morecambe will need to be ready to fully capitalise on the potential to realise the transformational benefits. This includes Morecambe's wider offer, local business supply chains to Eden and local people accessing employment opportunities.

Key project 2a	**Support and develop festivals and events**
Description	The establishment of festivals project group to share knowledge, develop ideas and best practice. Group will explore collaborative working opportunities between festivals and events with other communities around Morecambe Bay and further afield.
Delivery partners	Morecambe Town Council, local festival organisers/groups, business community, arts groups and Lancaster City Council.
Timescale	Immediate priority for action.
CCT role	Lead co-ordinator.
Funding	Basic expenses for event and meetings.
Economic benefits	Improve all Morecambe's festival offer to pull in more visitors and attendees. Knock on benefits for local businesses through visitor spend
Performance measures	Increased attendance numbers at festivals Increased visitor numbers Increased length of visitor stays Increased tourist spend
Links with other initiatives	1. Eden Project North 4. Maximise potential for arts and creative industries 5. Develop outdoor activities offer
Short Team Actions	Establish project group from within CCT to deliver this that includes key players. Run an event where ideas are generated and practical actions through inspiration from Morecambe festival leaders and national and international festival towns and areas.
Medium Term Actions	Explore links with Lancaster University and Lancaster Art Groups. Implementation of actions and lessons learned
Comments	The principal cost to this project is the time contribution made by festival and event organisers to come together to share ideas and work collaboratively.

Key project 2b	**Support and develop festivals and events**
Description	The current strategy for the Bay Arena, titled Art Park, received initial support from the Coastal Revival Fund in 2016. The CCT aims to continue to develop the site as a multifunctional public space for cultural programming, play and relaxation. Using the Lighter Quicker Cheaper method of incremental physical improvements and curating a combination of free core content to animate the space as well as developing ticketed event opportunities.

Delivery partners	Business community, arts groups and Lancaster City Council.
Timescale	Scoping and planning in the short term with bids in 2019 and delivery to follow.
CCT role	Lead co-ordinator.
Funding	£30K arts funders, private donors and crowdfunding.
Economic benefits	Improve festivals offer and setting. On non-festival/events days it will animate the space and improve visitor offer and experience.
Performance measures	Increased visitor numbers Increased length of visitor stays Increased tourist spend Increased attendance numbers at festivals
Links with other initiatives	2. Eden Project North 6. Maximise potential for arts and creative industries 7. Develop outdoor activities offer
Short Term Actions	Working alongside project group to develop further Quicker Cheaper proposals for Bay Arena festival site improvements that are either short term or are not fixed and so could be used at an alternate location.
Medium Term Actions	Trial and develop other spaces for festivals and events to reduce any adverse impacts if and when the Eden Project North goes ahead.
Comments	Bay arena is location for Eden Project North and if this is successful would take over this site, requiring a new festivals and events location. Links to Key project 2b

Key project 3	**Better connecting the seafront to the town**
Description	Next phase of town centre public realm improvements is to extend the pedestrian zone to really connect the town centre to the promenade. LCC has commissioned a report which suggests a "traffic regulated area" very much like the centre of Lancaster with mainly pedestrian access but with room for deliveries, exempted vehicles, disabled and emergency services. The most likely space to go for is from the front of the Midland up to Pedder Street. Although this work may need to be phased, there is some budget already set aside for some of the work.
Delivery partners	Lancaster City Council, Lancashire County Council & Morecambe BID
Timescale	Underway, but is a medium term goal for implementation.
CCT role	Partner liaison
Funding	£150-300K Lancaster City Council and Lancashire County Council
Economic benefits	Enhanced throughput of people between promenade and town centre will make for a more vibrant shopping and leisure environment and help challenge competing local retail nodes for spending.
Performance measures	Increased visitor numbers Increased length of visitor stays Increased tourist spend Increased attendance numbers at festivals Reduction in retail vacancies
Links with other initiatives	1. Eden Project North 2. Support festivals and events
Short Term Actions	Complete technical planning and design.
Medium Term Actions	Implement design.
Comments	Part of Morecambe Area Action Plan. Eden Project could delay design considerations and implementation.

Key project 4	**Maximise potential for arts and creatives industries**

Description	With a programme of festivals, a great public art and a growing artist's community Morecambe is emerging as an arts and creative industries town. Empty shops have been turned into makerspaces with artist studio space that double up as their shop window retail function as well and these add real interest and variety to Morecambe's retail areas. Morecambe Artists Colony, Deco Publique and the Exchange Creative CIC are examples of a number of groups, businesses, social enterprises and individuals that hint at the potential for Morecambe's future. Potential project values range from small scale conversion of shop units to form makerspaces to very large refurbishment projects to provide much greater scale and impact. The CCT will explore ways to support and develop the arts and creative industries.
Delivery partners	Various art groups & organisations including Morecambe Artists Colony, Exchange Creative CIC, Deco Publique & more.
Timescale	Immediate priority for action.
CCT role	Partner liaison.
Funding	To be confirmed various arts funders, private donors and crowdfunding.
Economic benefits	Growing sector that adds to *Uniquely Morecambe* brand, diversifies economy, brings prominent buildings and empty shops back into use via permanent use or pop-up.
Performance measures	Growth in arts and creative industries Vacant and derelict buildings brought back into use Increased visitor numbers Increased length of visitor stays Increased tourist spend Reduction in retail vacancies
Links with other initiatives	2. Support festivals and events 6. Telling our story 7. Refurbishment and reuse of prominent derelict and underused buildings 8. Develop strategies to assist local people to benefit from economic growth
Short Term Actions	Establish a project group to develop an action plan to progress this project. Investigate the potential for larger building refurbishment for arts and creative industries incubator and workshops. Develop proposals for small makerspace units and pop up shops
Medium Term Actions	To be confirmed following action plan
Comments	Build upon success of growing economic sector that adds to the *Uniquely Morecambe* brand. Need to bring together a project group to develop an action plan to progress this project. Potential to diversify town's offer.

Key project 5	**Developing outdoor activities offer**
Description	Morecambe is already great for walking and cycling, with a beautiful and fully accessible long promenade with the unrivalled views of Morecambe Bay. Excellent cycling facilities including the Bay Cycle Way national cycle route 700, Morecambe to Bridlington Coast to Coast route and traffic free cycle route to Lancaster and the Lune Valley. Kite surfing, sailing, and fishing are part of a growing water sports scene. This project will look to develop an offer clustering several outdoor activities to encourage holidaymakers to visit for longer. Morcambe has the space and several development sites with good access. The CCT will consider what outdoor sports should be encouraged and what is need to support creating a compelling offer. This might involve new infrastructure, development incentives and marketing. A longer-term ambition is to link into development around England's Coastal Foothpath and to look at other coastal towns and their operators of outdoor activities. Future projects might include: • Develop/promote sailing, kite surfing and other water-sports opportunities. • Develop cycle, e-bike and all terrain mobility scooter hire and charge points. • Promote the promenade as part of the English Coast Path. • Create and promoting walking/cycling loops and spurs from the promenade.

Delivery partners	Lancaster City Council, BID, other CCTs & Sporting organisations
Timescale	Immediate action
CCT role	Co-ordination
Funding	To be confirmed – various lottery, health and private donors.
Economic benefits	Leisure tourism can generate increased visitor numbers and tourist spend. Outdoor activities can really animate the promenade for non-participants by adding interest, movement and entertainment.
Performance measures	New outdoor activities / or growth in existing activities Increased visitor numbers Increased length of visitor stays Increased tourist spend
Links with other initiatives	3. Support festivals and events 9. Telling our story
Short Term Actions	Scope out potential opportunities and develop action plan.
Medium Term Actions	Implement action plan.
Comments	Need to bring together a project group to develop an action plan to progress this project. There is existing work that baselined existing watersport activity.

Key project 6	**Telling our story**
Description	Morecambe's unique offer and character has emerged through the CCT as key marketing asset. There is a need to link and work with the wider Morecambe Bay brand and align to the VisitLancashire brand. There is some great work already in progress to implement the graphic style and stories of the Morecambe Bay brand, with its connections to Art Deco and the Midland Hotel. This is led by Marketing Lancashire and Cumbria Tourism. The aim is tell the story for Morecambe and Heysham in the context of the wider brand. Uptake of a strategic approach by businesses will require their involvement to sell the area's story.
Delivery partners	Lancaster City Council, Marketing Lancashire, Morecambe Bay Partnership, Morecambe Chamber of Commerce, Morecambe BID
Timescale	Already underway.
CCT role	Co-ordination
Funding	To be confirmed – various lottery, health and private donors.
Economic benefits	Positive brand marketing for Morecambe will benefit all businesses in the town.
Performance measures	High level of take up Increased visitor numbers Increased length of visitor stays Increased tourist spend
Links with other initiatives	4. Support festivals and events 9. Telling our story
Short Term Actions	Establish project board to develop the story for the area and link it with the wider Morecambe Bay brand. Develop marketing plan and secure funding.
Medium Term Actions	Launch and deliver marketing plan.
Comments	Morecambe will be well known with visitors as a vibrant town buzzing with festivals and activities set to a stunning natural and cultural backdrop. It will have a strong identity promoted by businesses and partners. CCT to promote uptake and use of Uniquely Morecambe brand.

Key project 7	**Refurbishment and re-use of prominent derelict and underused buildings**

Description	The prevalence of prominent derelict and underused buildings needs to be addressed. The CCT is keen to support refurbishment projects that also deliver on other key projects/bodies of work of the economic plan. Examples include the derelict former Trinity Methodist Church and the former Co-Op Department Store in the West End as well as Crystal Ts in Morecambe town centre.
Delivery partners	Lancaster City Council, various art groups & organisations including Morecambe Artists Colony, Exchange Creative CIC, Deco Publique etc.
Timescale	In the short-term, the CCT will work to bring forward feasibility work for the former Co-Op department store. This feasibility work and others will inform viable proposals for the medium term.
CCT role	Project sponsor
Funding	Initial cost estimated at £75k from Lancaster City Council and Coastal Revival Fund.
Economic benefits	Positive impact on place and economic impact from business and community activity inside.
Performance measures	Reduction in prominent derelict and underused buildings Reduction in levels of deprivation in CCT Growth in arts and creative industries Increased visitor numbers Increased length of visitor stays Increased tourist spend
Links with other initiatives	8. Develop strategies to assist local people to benefit from economic growth 4. Maximise potential for arts and creative industries
Short Term Actions	Undertake baseline research to compile problem properties. Develop feasibility proposals for Co-Op Building. Outline priorities for action and tools to achieve results.
Medium Term Actions	Focussed targeting of problem properties. Develop funding strategy for Co-Op Building.
Comments	Eden announcement provides increased Investor confidence in Morecambe and should help overcome some barriers to bringing buildings back into use.

Key project 8	**Develop strategies to assist CCT residents to benefit from economic growth**
Description	The central wards of the CCT area are quite deprived with poor income, employment, education and health and yet is located adjacent to existing and planned economic growth locations. The CCT will support provision of innovative strategies and projects to enable people in these communities to benefit directly from economic growth prospects and generally be more economically active.
Delivery partners	Lancaster City Council, BID, Employment & Skills Partnership, local businesses & local groups/charities.
Timescale	In the short term the CCT will co-ordinate and engage with ESP, business, BID and community groups to set actions.
CCT role	Co-ordination and partner liaison
Funding	To be confirmed
Economic benefits	Entire focus is upon helping the deeply deprived CCT community to benefit from economic growth in the area.
Performance measures	Reduction in levels of deprivation in CCT
Links with other initiatives	1. Eden Project North 2. Support and develop festivals and events 4. Maximise potential for arts and creative industries
Short Term Actions	CCT engagement with Employment and Skills Partnership (ESP). Establish a partnership of business and community interests to take forward proposals for shared apprenticeship activities in the area. Develop action plan in conjunction with ESP and Businesses

Medium Term Actions	Workspace for skills and training that deliver courses that respond to the needs of existing and new businesses. Incubator units that include a range of support for business start-ups. Flexible studio workshop space for arts and creative start-ups and businesses. Targeted interventions to help address aspects of poverty through education and self-help.
Comments	Initiate wider business engagement to enable an action plan to be developed to achieve aims.

11. Performance Measures

The lack of baseline data at a local CCT level is a challenge in being able to set SMART performance measures. As a result the project areas in many instances will need to baseline the existing situation from which point performance can be measured.

- Increased visitor numbers
- Increased length of visitor stays
- Increased tourist spend
- Increased attendance numbers at festivals
- Reduction in levels of deprivation in CCT
- Reduction of HGVs along promenade through town
- Number of new indoor attractions
- Growth in arts and creative industries
- High level of take up for Uniquely Morecambe brand
- New outdoor activities / or growth in existing activities Reduction in prominent derelict and underused buildings
- Reduction in retail vacancies

12. Barriers

- Failure to secure funding for projects is a fundamental barrier to the economic plan.
- Delay or non-delivery of key projects.
- Addressing the deep deprivation will require further support and resources from other agencies outside of the CCT.
- Failure to bridge skills gap for CCT residents to access new employment opportunities.
- Public sector funding and permissions necessary for transport and public realm work.
- Morecambe Bay is the town's greatest asset but its highly designated protection possess a challenge to the Eden Project North and development of water-sports activities.
- Downside risk of Eden Project North is that investment and decisions may hold back until there is more certainty.

13. Resources

Lancaster City Council act as the accountable body for the CCT and any Coastal Communities funding bids. The council also provides support to the CCT meetings and for developing projects and prospective bids.

Apart from the costs of hosting meetings, there are no significant running costs for the CCT beyond the individual project costs as identified as most stakeholder support for the team will be provided 'in kind'.

The majority of resources sits within each of the individual projects and initiatives. Some of these are wholly external to the CCT e.g. Eden Project North estimated is £100M.

14. Maximising Resources

The plan is predicated upon making best use of the resources we have by working together in a strategic and informed way. The collaborative element of the work outlined in the plan is the most important and it is this which will give us success. By working together, reducing duplication, not competing for funding, identifying appropriate knowledge and expertise in the CCT area and by working together the CCT will maximise the benefits to Morecambe and Heysham.

15. Promenade to Port Key Information

Promenade to Port Coastal Communities Team (Morecambe & Heysham)		
Key Contact	Economic Development Team	Lancaster City Council, Palatine Hall, 2 Dalton Square, Lancaster, Lancashire, LA1 1PW, 01524 582326 econdev@lancaster.gov.uk
CCT Membership Board	Brendan Hughes John O'Neill Justina Ma Representative Johnny Bean David Brayshaw Vicky Lofthouse Rob Irvine Mark Prada Charlotte Rawes Councillor Janice Hanson Councillor Darren Clifford David Croxall David Wilcox Yak Patel Representative	Morecambe Business Improvement District Morecambe Business Improvement District Marketing Lancashire West End Million Morecambe Artist Colony Go Morecambe Lancaster & District Chamber of Commerce Bare Village Business Association Bay Tourism Association Lancaster and Morecambe College City Councillor & Cabinet Member City Councillor & Cabinet Member Morecambe Town Council Heysham Neighbourhood Council Lancaster District CVS Eden Project North (prospective member)
Invited attendees	Jenny Wain Tom Brown, Economic Development Officer	Morecambe Bay Partnership Lancaster City Council
Accountable Body Representative	Councillor Janice Hanson, Portfolio holder for Economic Regeneration & Planning	Lancaster City Council, PO Box 4, Town Hall, Dalton Square, Lancaster, Lancashire, LA1 1QR
Support Structure	Primary support is from Lancaster City Council Economic Development team's officer Tom Brown. Other relevant council departments and teams provide additional support as necessary. However, the CCT can draw on any resource with the partner organisations.	
Areas of Specific Interest	The P2P CCT would benefit from opportunities to liaise and visit other CCTs with: • An active festivals and events programme. • Strategies of dealing with challenging prominent empty and underused buildings. • Employment and skills training partnerships with businesses	

APPENDICES

Economic Plan 2018-2021 Promenade to Port Coastal Community Team

January 2019

Version 1.0

Contents

16. Appendix A – CACI Retail Footprint Report Summary Morecambe

There are two data sets provided as part of the CACI report. Firstly a Retail Footprint Centre Focus Report with specific details for the Morecambe Centre and secondly a set of summary data for 18 Centres including Morecambe.

The report provides a wide range of data relating to the broad level of spending by residents in the Morecambe Centre and offers insights into how much of the total residential spend from locals is spent in the centre. Separate spending estimates for workers and tourists are provided along with some data on spending at other relatively local centres. The report drills down into specific categories of retailing establishments and stratifies the local offering using a quality definition for the local retail offering. Residents are profiled using a proprietary social classification and the population analysed according to this classification scheme.

The retail centre is ranked using a measure of attractiveness and comparisons can be made with the selected comparison group. Some statistical neighbours are identified of which two are part of the comparison group enabling a closer comparative view of these.

This paper is intended as an exploration of the data provided and seeks to explain the sometimes rather obscure figures in some detail. It is clear that there is a wealth of detail that may give insights into the retail environment and the potential for development and improvements. A full analysis of the data is not intended though some obvious points are listed. The main purpose of the paper is to present the data in a more understandable way.

Retail offer

Retail outlets are classified into

- **Premium** - examples given are House of Fraser, Selfridges
- **Mass** – examples given include WH Smith, Topshop, Boots
- **Value** – examples given are Poundstretcher, TK Maxx, Primark

Morecambe's retail offer is made up of 1% Premium, 55% Mass and 44% value.

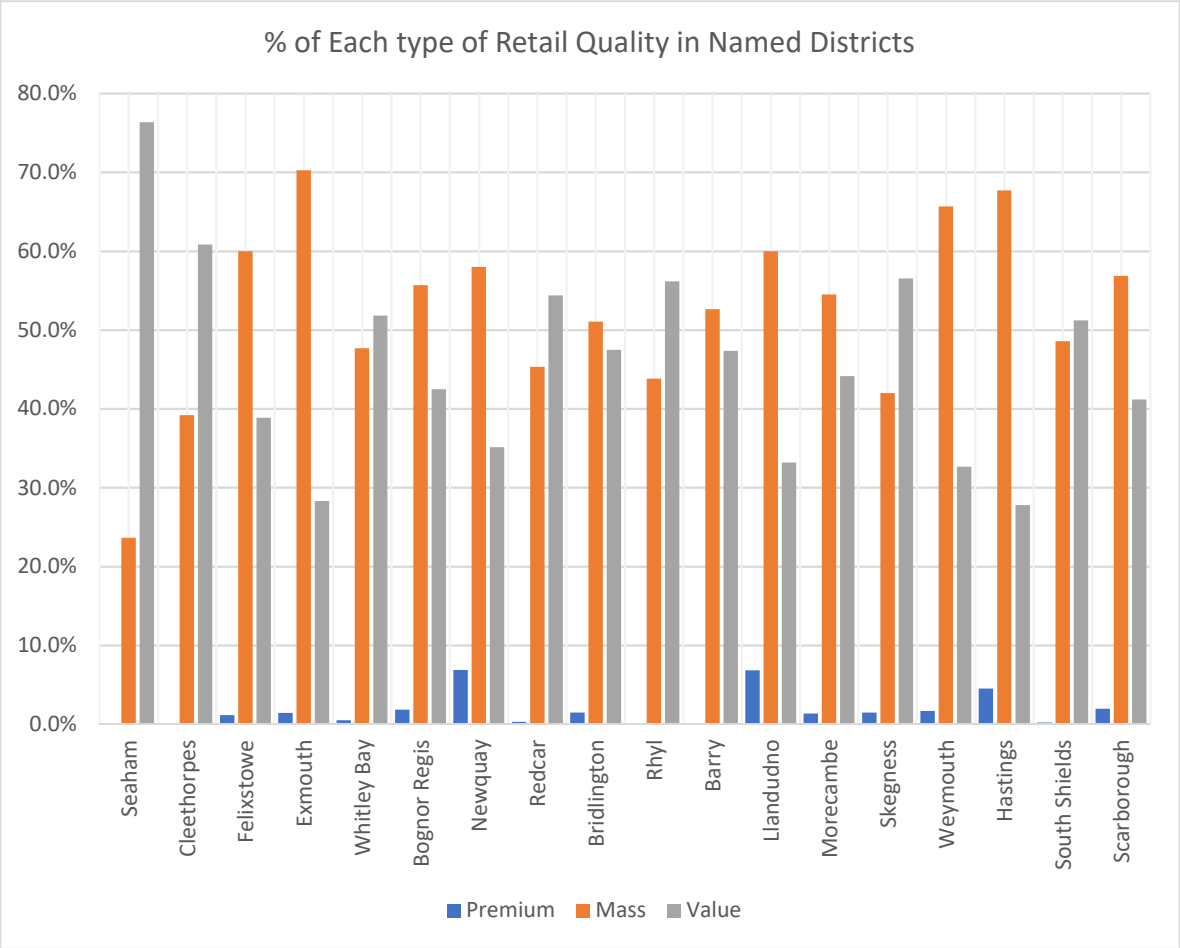
The report compares Morecambe to 17 other districts

District	% Retail Premium	% Retail Mass	% Retail Value
Seaham	0.0%	23.7%	76.3%
Cleethorpes	0.0%	39.2%	60.8%
Felixstowe	1.2%	60.0%	38.9%
Exmouth	1.4%	70.3%	28.3%
Whitley Bay	0.5%	47.7%	51.8%
Bognor Regis	1.9%	55.7%	42.5%
Newquay	6.9%	58.0%	35.1%
Redcar	0.3%	45.3%	54.4%
Bridlington	1.5%	51.0%	47.5%
Rhyl	0.0%	43.8%	56.2%
Barry	0.0%	52.7%	47.4%
Llandudno	6.8%	60.0%	33.2%
Morecambe	1.4%	54.5%	44.1%
Skegness	1.5%	42.0%	56.6%
Weymouth	1.7%	65.7%	32.7%
Hastings	4.5%	67.7%	27.8%
South Shields	0.2%	48.6%	51.2%

Scarborough	2.0%	56.9%	41.2%

Table 1

The same data graphically:



Morecambe is not far from the average for the selected comparators. The average for the comparator districts is

Premium 1.8% (Morecambe -0.4%)

Mass 52.4% (Morecambe +2.1%)

Value 45.9% (Morecambe +1.8%)

RF Score

The CACI methodology calculates a score (The RF Score) which represents the attractiveness of the centre. This looks at

- The turnover from relevant multiple retailers in each centre.
- The turnover from relevant department stores in each centre.
- The count of independent comparison goods retailers in each centre.
- The presence of 'footfall generators' in each centre, e.g. banks, restaurants, cinemas.

Centres fall into major and minor categories:

Centre : Major Type	Number of these centres	Average RF Score	Average Expenditure
Primary Centres	46	1859	£807M
Major Centres	93	717	£201M
Metropolitan Centres	64	620	£154M
Regional Towns*	832	105	£20M
Rural Centres	647	54	£8M
Local Centres	267	107	£18M
Urban Centres	1244	91	£15M
Regional Malls	13	1825	£850M
District Centres	97	109	£30M
Outlet Centres	55	233	£91M
Retail Parks	980	128	£38M
Leisure Parks	72	23	£N/A
Supermarkets	146	51	£16M
International Transport Terminals	24	139	£N/A

Table 2

* *Regional Towns (Morecambe's major category) have 4 sub categories – the average score for the Large Regional Town sub category is between 300 & 700.*

This score is only useful in a context – either in comparison with centres that are in the same category or with a selected comparator group. The selected comparator group is the group of 18 shown above (table 1) and the RF score is outlined in table 2 **below** (ranked from highest score to lowest) together with the major and minor class as used by the CACI methodology. Districts in the same category as Morecambe are highlighted in green with statistical neighbours (see below) in **bold**

District	RF Score 2018	Minor Class Name	Major Class Name
Scarborough	695	Major Regional Towns	Regional Towns
Weymouth	516	Large Regional Towns	Regional Towns
Hastings	486	Large Regional Towns	Regional Towns
South Shields	470	Small Metropolitan Towns	Metropolitan Towns
Redcar	**380**	**Large Regional Towns**	**Regional Towns**
Bridlington	**379**	**Large Regional Towns**	**Regional Towns**
Rhyl	357	Large Regional Towns	Regional Towns
Skegness	354	Large Rural Centres	Rural Centres
Newquay	347	Large Rural Centres	Rural Centres
Llandudno	347	Large Regional Towns	Regional Towns
Morecambe	**325**	**Large Regional Towns**	**Regional Towns**
Felixstowe	301	Medium Regional Towns	Regional Towns
Bognor Regis	301	Medium Regional Towns	Regional Towns
Exmouth	270	Medium Regional Towns	Regional Towns
Barry	259	Local Centres	Local Centres
Whitley Bay	256	Local Centres	Local Centres
Seaham	163	Medium Regional Towns	Regional Towns
Cleethorpes	142	Small Regional Towns	Regional Towns

Table 3

Morecambe ranks 11th in the comparator group but it is important to note that the comparator group contains centres that are in different categories. The classification scheme used by CACI expects categories to score differently so it is not surprising that Scarborough as a **Major Regional town** scores above 600 since 600 is the score expected of locations in the Major Regional Town

category. **Large Regional Towns** like Morecambe are expected to score between 300 and 700 whilst **Medium Regional Towns** score over 150 and **Small Regional Towns** should score below 200. **Local Centres** score at least 100.

Looking at Morecambe's score it is close to the minimum expected and is the lowest of the group of Regional Towns in the comparison group selected. The conclusion must be that Morecambe is at the lower end of the range expected in terms of the attractiveness of its retail offering.

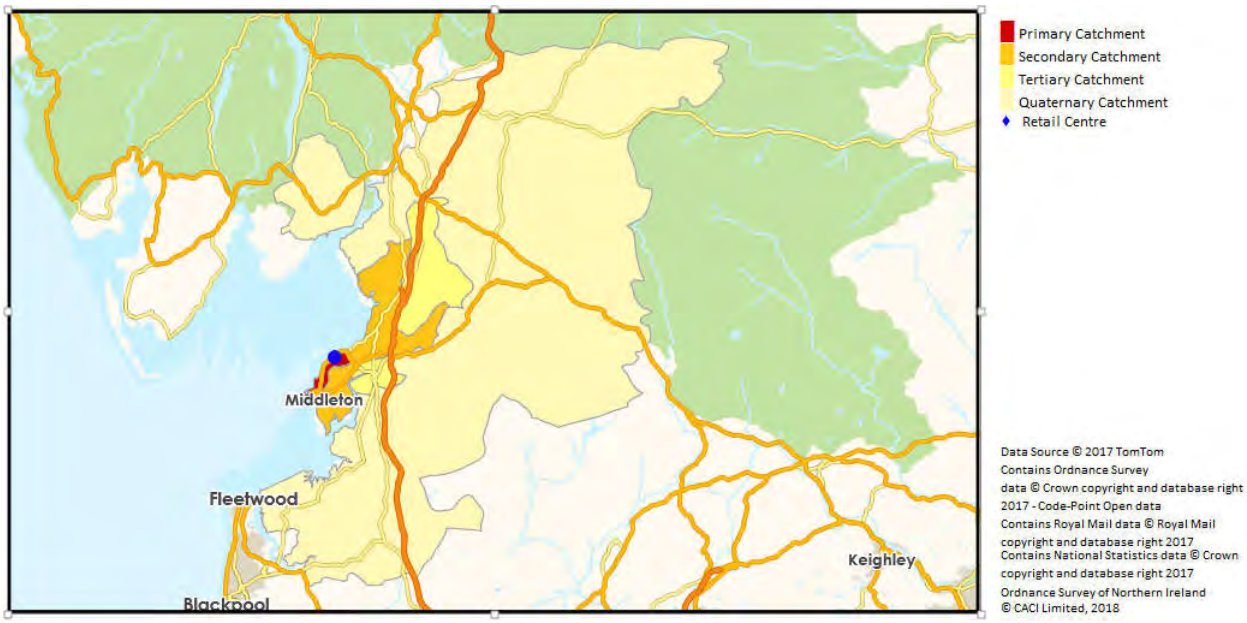
Statistical Neighbours

CACI produce a list of statistical neighbours by correlating various factors. To be a statistical neighbour requires reasonably close correlation and both **Redcar** and **Bridlington** are identified as statistical neighbours **and** are included in the comparator group. As such there is good reason to pay particular attention to the RF scores of Bridlington and Redcar in particular. These two statistical neighbours can be seen to have higher scores than Morecambe, indicating that their retail footprint is more attractive than Morecambe's. The other statistical neighbours are not included in the comparator group and RF scores are not given.

To provide some context for RF scores – the highest rated centres in London - classed as "International centres" are rated at a score of 9,231 whilst "Principal Centres" which tend to be in major cities score mostly over 1,600 and tend to have over 20% premium offerings.

Spending

The CACI report offers a number of different ways to view spending. Firstly there is an analysis of total spending within the different catchment areas. Catchment areas are calculated by working out what proportion of people in localised areas defined by Lower Super Output Areas (LSOAs - a statistical area used by the Office for National Statistics) actually shop in the centre in question. The primary area is the area which supplies 50% of customers. The secondary catchment area accounts – with the primary for 75% and the Tertiary with primary and secondary accounts for 90%. The addition of the Quaternary area accounts for all. This is mapped as shown below



The spending of the people who visit the centre is known as the **Weighted Residential Spend** and figures are given for this spend by Primary, Secondary, Tertiary and Quaternary catchment areas. The figures for this are:

Primary	£38,456,173
Secondary	£15,561,134
Tertiary	£ 8,975,494
Quaternary	£ 6,103,919
Total residential **weighted** spend	**£69,096,720**

However total spending by all residents in each of the catchment areas is greater since people shop elsewhere. The figure for this spending is called the **Unweighted Residential Spend** and is as shown below

Primary	£ 76,663,963
Secondary	£ 76,761,106
Tertiary	£ 98,903,340
Quaternary	£212,948,619
Total **unweighted** residential spend	**£465,277,029**

Using these two sets of figures it is easy to work out what proportion of total spending by residents in each of the catchment areas is spent in Morecambe Centre (weighted figure / unweighted figure *100)

So we find that:

Primary catchment area –	Morecambe Centre has **50.16%** of the total residential spend*
Secondary catchment area –	Morecambe centre has **20.27%** of the total residential spend*
Tertiary catchment area –	Morecambe centre has **9.08%** of the total residential spend*
Quaternary area –	Morecambe centre has **2.87%** of the total residential spend*

* % of the unweighted spend

It is also possible to see that Morecambe centre accounts for **14.85%** of the unweighted residential spending in all areas (i.e. 69,096,720/465,277,029*100)

It is clear to see from these figures that slightly under half the spending of residents in the primary catchment area is being spent outside the Morecambe centre suggesting that either the centre does not offer what people need or that there are more attractive areas to shop in elsewhere. If it was possible to increase the market share of Morecambe centre by 1% from the primary catchment area the centre would attract an additional £766,639 of revenue. Identifying what would make the centre more attractive to residential shoppers clearly could show the way to build local revenues.

Residential Spending, however, is not the whole story. The CACI report also provides estimates of spending by those who are working in the area and by tourists. The number of workers is estimated from a number of Office for National Statistics surveys and from census data projected from the year of the study to 2018. Accordingly worker spending in the Morecambe Centre is estimated as £3,325,472

Tourist spending relates to spending by people outside their normal routine and covers a wide range of trips including overnight stays, daytime excursions and business trips. Estimates of tourism spending in the Morecambe Centre is £3,771,759

So, total Morecambe Centre spending is estimated to be the sum of the weighted residential spend plus the worker and tourist spend. This is

£69,096,720 + £3,325,472 +£3,771,759 = **£76,193,950**

A final estimate is provided for on line spending which is not included in the spending estimate but is suggested to be the leakage of spending from the centre. This is estimated to be **£23,187,400.**

Presumably the on line spend could / should be deducted from the unweighted spend to reduce the potential spend from the unweighted population.

Spending Leakage

The CACI report provides a spend leakage estimate for the unweighted residential spend at nearby centres. A market share is given which is the share of the unweighted residential spend for Primary to Quaternary areas. The report also gives an RF score for several local RF areas.

The spending leakage is estimated as:

Centre	Type	RF Score	Distance (miles)	Spending	Market share of spend
Lancaster	Regional Towns	693	3.23	£199,443,204	42.87%
Kendal	Regional Towns	624	18.53	£27,441,477	5.9%
Morecambe – Sunnycliff Retail Park	Retail Parks	96	1.52	£25,314,731	5.44%
Preston	Primary Centres	1005	22.63	17,680,102	3.8%

Table 4

Looking at the RF score which, as we said above, reflects the attractiveness of the centre it's clear that some competing centres relatively nearby are more attractive than Morecambe Centre and attract significant spend from residents. Note – these figures only relate to the resident spend not to worker or tourist spending.

Social Groupings

CACI uses a system of classifying social groups called Acorn. Groups are described in terms of their typical lifestyle factors including incomes, qualifications, property ownership and other factors.

The top three categories identified as Morecambe groups are:

Comfortable Seniors: 10.1% of Morecambe Centre residents (average 2.4%)

These established communities are generally made up of retired and older empty nester couples. Property tends to be two and three bedroom semi-detached houses, bungalows and some smaller purpose-built flats. These will typically be slightly below the average value for the area, although there will be variation around this level. The majority will have paid off their mortgage and own their homes outright. The working population are in a mix of middle, lower management and supervisory jobs while some of the pensioners might have had more senior roles. Overall incomes are relatively modest since a good number of these people are now living off their pension.

However since their children tend to have left home and they have little or no mortgage left to pay, many will have a reasonable disposable income. They may also have some investments for security in their old age. Broadly these people feel comfortable with few in financial difficulties. However lower investment incomes due to low interest rates is likely to be a concern for some. They are unlikely to use the internet more than sporadically for practical purposes such as email, purchasing travel tickets. New technology is unlikely to attract these people and their phone is unlikely to be able to access the internet. They are likely to prefer to be contacted by regular mail rather than any other channel. Free digital services are likely to be preferred to a cable or satellite service. Whilst

most people get their news from the TV, the Daily Mail is the most popular newspaper. These older people have sufficient investments and pensions to feel secure about their future.

Young Hardship: 15.2% of Morecambe Centre Residents (average 5.3%)

Younger people are more prevalent in these streets. They own or rent small terraced houses or flats that tend to be amongst the cheapest housing in the town. A number of the residents might be first time buyers and it is usual for mortgages to have many years left to run. While there are couple and families with young children, single people or single parent residents are found more frequently than average. Some may be financially supporting a child that does not live with them. In some cases the residents of these areas may include people from an East European background. Educational qualifications tend to be lower than average and much of the employment is in junior office roles and semi-skilled or manual occupations. There are pockets of deprivation in this group. Incomes range from moderate to low and unemployment is higher than the national average. The numbers claiming benefits may be up to double the national average in some places. Generally these people have modest levels of savings and many find it hard to save regularly from modest incomes. There are some households with high levels of debt. Some will have been refused credit and generally these people are less likely to use a credit card. A number of these people will have loans that they may be having difficulty repaying. A small number may have accumulated debts in excess of their annual income. Car ownership is below the national average and cars tend to be lower value and usually bought second hand. Some will own smartphones, although these are less likely to be an iPhone than a less expensive less fashionable model. These people have a modest lifestyle and some may be struggling to get by in the current economic climate.

Steady Neighbourhoods 17.8% of Morecambe Centre Residents (average 8.3%)

These home-owning families, often middle–aged, are living comfortably in suburban and urban locations. They mainly own older, lower priced, three bedroom terraced or semi-detached homes, which they may have occupied for many years. Families might include young children, teenagers or young adults who have not yet left home. These areas will also include some empty nesters. People typically have GCSE and A level qualifications although some have degrees. They tend to be employed in a range of middle management and clerical roles or as shop workers and semi-skilled manual workers and overall household incomes are around the national average. Their spending and interaction with financial services broadly mirrors the national average. Most in this group have some small savings, an ISA and perhaps a few shares. Although they do generally use the internet, few of these people will go online extensively on a regular basis. They are more likely to read the Daily Mirror, the Daily Express or the Daily Star than a broadsheet paper. Celebrity, travel, cooking and glossy women's magazines may be popular with some. These working families form the bedrock of many towns across Britain.

Other Groups

The report shows that the population in Morecambe is quite skewed towards the less affluent groups. Only 0.1% of residents are within the group enjoying lavish lifestyles (1.3% average) and 6% fall into the executive wealth category (12.5% average) On the other hand, as shown above, 15.2% are described as Young Hardship (average 5.3%) On the other hand there are 10.1% "Comfortable Seniors" (2.4% average) and 17.8% Steady Neighbourhood members (average 8.3%) The Mature Money group is a little higher than the 8.9% average at 10.2%.

The full distribution of groups is below as shown in the report

Acorn Group	Centre %	Base %	Index av=100

Affluent Achievers			
A. Lavish Lifestyles	0.1%	1.3%	7
B. Executive Wealth	6.0%	12.5%	48
C. Mature Money	10.2%	8.9%	**115**
Rising Prosperity			
D. City Sophisticates	0.0%	3.4%	1
E. Career Climbers	1.4%	6.0%	23
Comfortable Communities			
F. Countryside Communities	5.2%	6.3%	83
G. Successful Suburbs	4.4%	6.2%	72
H. Steady Neighbourhoods	17.8%	8.3%	**215**
I. Comfortable Seniors	10.1%	2.4%	**430**
J. Starting Out	3.3%	4.1%	80
Financially Stretched			
K. Student Life	2.2%	2.7%	81
L. Modest Means	9.9%	8.0%	**125**
M. Striving Families	4.2%	8.2%	52
N. Poorer Pensioners	3.7%	4.4%	83
Urban Adversity			
O. Young Hardship	15.2%	5.3%	**288**
P. Struggling Estates	2.6%	7.6%	35
Q. Difficult Circumstances	3.5%	4.6%	76

Table 5

Retail Details

There are **467** stores identified in the Morecambe retail footprint area with **94** being chains and **373** independent. The types of store are compared with an average and Morecambe proves to have:

- More leisure related stores than average
- Fewer convenience goods stores
- Fewer financial related outlets
- More clothing and footwear stores
- More durable goods retailers
- More in the "other" retail category

The summary is:

	Number of Stores	Centre %	Base %	Index
Clothing & Footwear	39	8.4%	7.8%	**108**
Health & Beauty	62	13.3%	13.5%	98
Convenience Goods	34	7.3%	11.9%	61
Durable	40	8.6%	7.9%	**108**
Financial	13	2.8%	4.4%	64
Leisure	40	8.6%	5.9%	**145**
Eating & Drinking	97	20.8%	21.7%	96
Motoring & Transport	24	5.1%	7.9%	65

Other Retail	118	25.3%	19.1%	**132**

Table 6

The index shows whether there are more or less of each type of store than the average (base) Morecambe has more Leisure, Clothing and footwear and Durable goods retailers and a greater percentage of "other" retailers and less than average Convenience goods, Motoring & Transport, Financial, Eating and Drinking and Health and Beauty stores.

The report then adds a lot more detail looking at the relative presence of store types in the centre. The Index shows what percentage of the average (base) are stores of each type

Reordering this list gives some idea of what type of retail outlets are more or less common than expected. As is immediately obvious there are some retail types that are significantly above the baseline. Pawnbrokers and second hand shops top the list.

Retail sector	**Number of Stores**	**Index % of stores)**
Pawnbrokers & second hand shops	18	730
Nursery goods & accessories	2	608
Bowling alleys	1	575
Specialist food shops	3	364
Clothes - children	4	349
Clothing hire/repair/alterations	3	348
Bingo halls	1	331
Other leisure facilities	8	326
Theatres & concert halls	2	294
Computer Games	2	248
Gift shops	9	233
Camera shops & developers	2	206
Other specialist shops	24	194
Cinemas	1	186
Hotels & other accommodation	16	185
Pet shops & pet supplies	6	184
Household security, repairs & services	2	184
Furniture shops	9	175
Art & craft, galleries	5	169
Floor coverings	5	166
Domestic apps/heating & lighting	3	164
Discount & surplus stores	6	164
Ice cream parlours	2	163
Confectionery	3	163
Fabrics & haberdashers	2	156
Charity shops	16	155
Leisure	40	145
Building societies	2	142
Sports goods & clothing	7	140
Cafes, snack shops & tea rooms	27	139
Other Retail	118	132

Toys	2	129
Music shops	1	126
Soft furnishings / decoration	5	123
Taxis / private hire	2	122
Health foods & products	2	122
Hairdressers	28	119
Garage services & parking	19	114
Pubs, bars & clubs	27	112
Accountants/mortgages/claims & advice	2	111
Beauty salons & products	23	111
Booksellers & collectables	5	111
Florists	3	108
Durable	40	108
Clothing & Footwear	39	108
Shoe repairs / key cutting	2	107
Health & Beauty	62	98
Fashion shops	11	97
Eating & Drinking	97	96
Fast food / take-away	30	93
Stationery & cards	3	92
Electrical goods	5	90
Banks & other financial institutions	6	86
Estate agents / letting agents	12	86
Butchers, fishmongers & delis	4	79
Clothes - mixed	2	78
Insurance agents	1	76
Chemists	7	76
Clothes - women	5	74
Health clubs, sports & leisure centres	3	73
Launderettes & dry cleaning	3	72
Newsagents	3	72
Clothes - men	2	72
Bathrooms & kitchens	2	69
Bookmakers	5	68
Motoring & Transport	24	65
Financial	13	64
Convenience Goods	34	61
Travel agents	2	61
Phone stores	3	58
Footwear	2	57
Bakers shops	3	57
Hearing aids	1	55
Clothing accessories	1	50
Supermarkets	3	48
Convenience stores	11	46

Restaurants	11	46
Builders/plumbers & glaziers	2	45
Opticians	2	41
Wines, spirits & beers	1	39
Stations & transport terminals	1	38
Alternative & comp medicines	1	33
Grocers / fruit sellers	1	28
Post office services	2	24
DIY centres & shops	1	22
Jewellers	1	19
Petrol filling stations	1	17
Vehicle dealers / accessories	1	12

Table 7

The report identifies **weekly spend** by type of goods. The table below shows this spending. In this table spending is sorted by the index so spending that is most above average is at the top. The index represents the percentage of the base spend so that a figure over 100 shows that spending on goods of that type is above average and an index under 100 shows that spending on that category is below average

Spend Division/Group	Total Weekly Spend	Centre (per capita)	Base (per capita)	Index
Carpets and other floor coverings	£47,825	£1.47	£1.17	126
Furniture and furnishings	£148,681	£4.56	£3.66	124
Telephone and telefax equipment	£4,970	£0.15	£0.13	122
Small electric household appliances	£7,127	£0.22	£0.18	118
Major household appliances	£33,614	£1.03	£0.87	118
Household textiles	£63,040	£1.93	£1.70	114
Clothing materials	£5,169	£0.16	£0.14	114
Womenswear	£165,944	£5.08	£4.48	113
Gardens, plants and flowers	£34,852	£1.07	£0.95	112
Shoes and other footwear	£61,335	£1.88	£1.69	111
Other clothing & accessories	£28,928	£0.89	£0.80	111
Other personal care appliances & prods	£141,556	£4.34	£3.92	111
Children's wear	£55,568	£1.70	£1.55	110
Games, toys and hobbies	£82,957	£2.54	£2.33	109
Electric appliances for personal care	£8,299	£0.25	£0.23	109
Menswear	£77,632	£2.38	£2.19	108
Books	£7,443	£0.23	£0.21	106
Bicycles	£21,538	£0.66	£0.64	104
Equipment for sport, camping etc.	£21,338	£0.65	£0.63	103
Stationery and drawing materials	£16,545	£0.51	£0.49	103
Recording media	£1,536	£0.05	£0.05	102
Glassware, tableware and utensils	£41,101	£1.26	£1.25	101
Small tools and accessories	£31,768	£0.97	£0.97	100
Information processing equipment	£22,814	£0.70	£0.71	99

Sound and video equipment	£22,296	£0.68	£0.70	97
Materials for maintenance of dwelling	£3,603	£0.11	£0.11	97
Major tools and equipment	£2,315	£0.07	£0.07	97
Photographic & cine equipment	£17,295	£0.53	£0.55	97
Other personal effects	£38,869	£1.19	£1.26	95
Jewellery, clocks and watches	£51,228	£1.57	£1.67	94
Medicines	£33,699	£1.03	£1.15	90
Other medical products	£3,337	£0.10	£0.11	90
Spectacles and accessories	£22,436	£0.69	£0.78	89

Table 8

Summary

The Morecambe Centre is rated towards the lower end of its category in terms of attractiveness. It is rated less attractive than other large regional towns or the two statistical neighbours identified within the comparison group. Morecambe's quality mix of retailers is similar to the average within the comparator group.

Slightly over half of all spending by those in the primary catchment area is spent in Morecambe centre and a 1% increase in the market share within the primary catchment area would attract over 3 quarters of a million pounds in extra spending. However it is clear that neighbouring centres in Lancaster and Kendal in particular are rated as more attractive centres than Morecambe and attract significant spend from the Morecambe catchment areas.

Residents of Morecambe are characterised as 55% relatively affluent (Categories: Affluent Achievers; Rising Prosperity; Comfortable Communities) with the remainder falling into less well-off categories: (Financially Stretched and Urban Adversity) There is no indication of the relative spending habits of the different groups and whether better off residents shop in the centre to the same or greater extent as the poorer groups.

The number of retailers in each retailing category shows that some categories are present in greater numbers than the average. So there are far more Pawnbrokers and second hand shops than expected and a lot more nursery goods and accessories shops. Spending in some retail categories is higher than average particularly in Carpets and other floor coverings and some spending categories are lower than average e.g. less spending on spectacles and accessories.

17. Appendix D - 2018 Indicators of Internet Use and Engagement

Developed by Alexiou and Singleton in partnership with University of Liverpool and Consumer Data Research Centre (CDRC) the 2018 Internet User Classification (IUC) is a bespoke classification that describes how people living in different parts of Great Britain interact with the Internet. This has an obvious impact on consumer behaviour, such as the use of brick-and-mortar retail relative to online shopping. However, it also has an important influence on the take-up of digital services and understanding this geography is critically important to mitigate digital inequality.

Datasets include; DataTalk's British Population Survey provides behavioural characteristics of Internet use and online-retailer's transactional data for shopping behaviour. Ofcom infrastructure data such as average download speed per postcode. ONS and Census data were used as secondary data to train models providing predictions at the small-area level.

The IUC has 10 unique profiles of neighbourhoods that are effectively in rank order of internet engagement and use based on a number of characteristics, the mean attributes of which are summarized below with the percentage of the CCT population listed alongside each group name.

IUC Groups and description

1. **e-Cultural Creators – 0%**

Engagement and content – high/daily for social networks, gaming, streaming and gaming.
Devices – mobile and laptops a various locations, often public places.
Demographic – transitionary aged 18-24 with a strong presence in city centres and universities

2. **e-Professionals – 0%**

Engagement and content – high/daily for gaming, online shopping for groceries and non-groceries
Devices – variety of devices and methods in a variety of settings – work, public, home, mobile etc
Demographic – urban professionals, typically aged 25 to 34 in areas close to city of affluent suburbs

3. **e-Veterans – 7%**

Engagement and content – frequent/experienced for info, services, shopping and social media
Devices – multiple devices and ways including at work
Demographic – mature and middle aged, affluent families and qualified professionals in suburbs

4. **Youthful Urban Fringe – 0%**

Engagement and content – average with high levels of social media but low online retailing
Devices – mobile and Wi-Fi with low broadband and desktops
Demographic – Ethnically diverse, young students/urbanites in informal households at city edges

5. **e-Rational Utilitarians – 0%**

Engagement and content – moderate for info, services, banking, shopping and groceries
Devices – home personal computers with low mobile access
Demographic – Late middle-aged or elderly located in rural and semi-rural areas

6. **e-Mainstream – 10%**

Engagement and content – average across most attributes, characterising the typical user
Devices – typically average use of a variety of methods and locations
Demographic – wide range of social echelons located in urban and transitional neighbourhoods

7. **Passive and Uncommitted Users – 41%**

Engagement and content – Limited, weekly or less for social media, gaming and limited shopping
Devices – smartphones with limited broadband
Demographic – broad group located outside city centres, with high levels of employment, close to suburbs or semi-rural

8. **Digital Seniors – 16%**

Engagement and content – Infrequent but adept for info, financial services and retail
Devices – Personal computer located at home using broadband
Demographic – Ageing, retired, white and relatively affluent in semi-rural or coastal areas

9. **Settled Offline Communities – 19%**

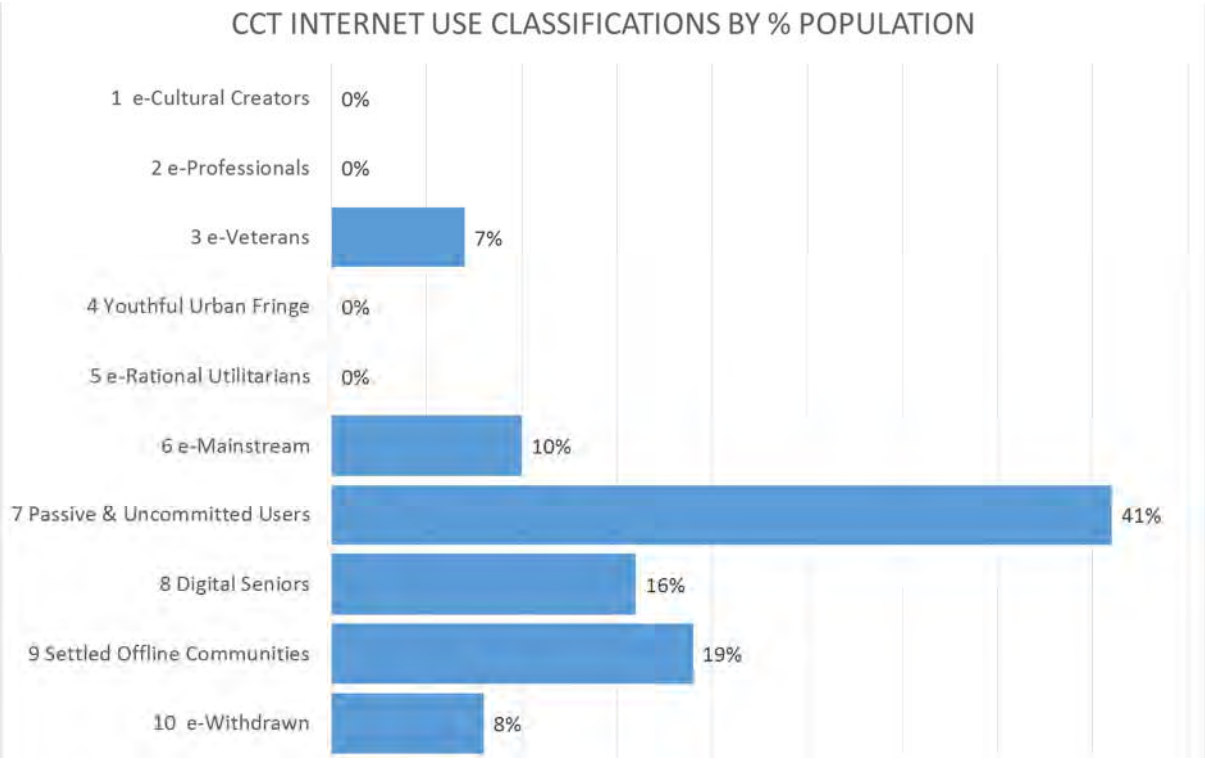
Engagement and content – Limited or not at all for information and retail (often bulky - white goods)
Devices – Personal computer located at home rather than mobile devices
Demographic – Elderly white British and retired in semi-rural areas.

10. **e-Withdrawn – 8%**

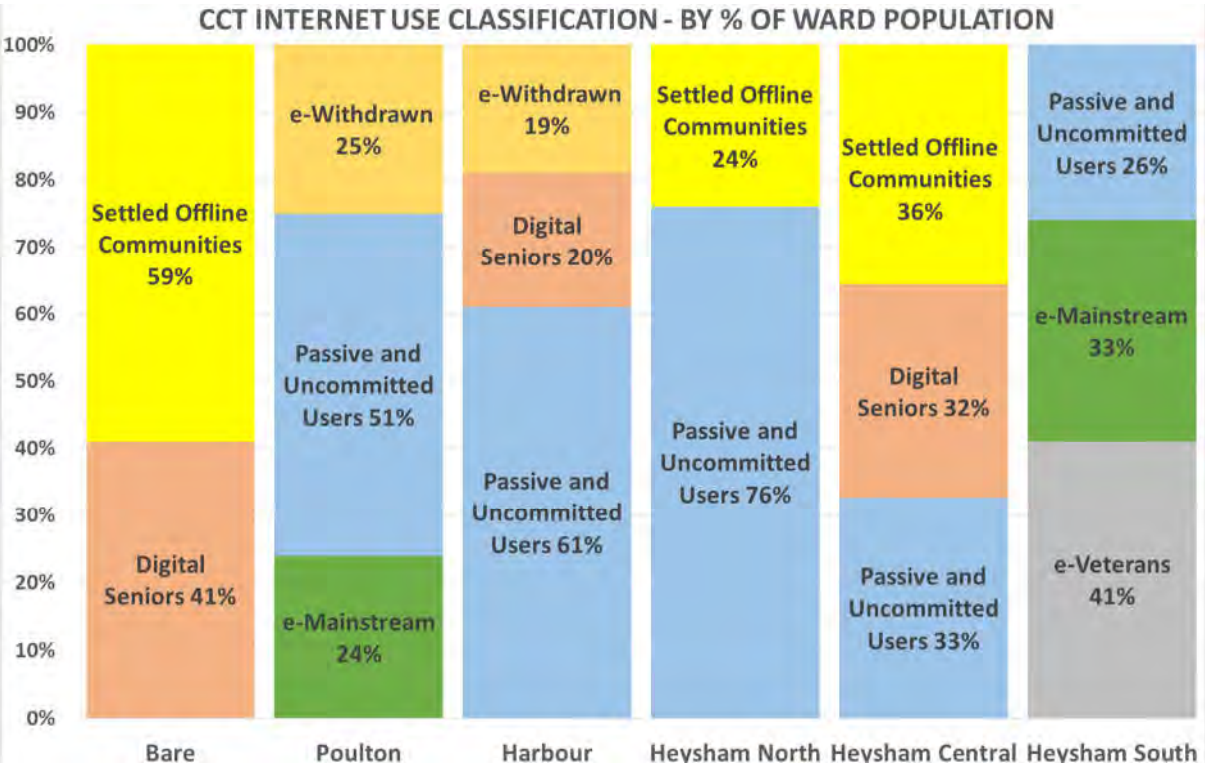
Engagement and content – Least engaged often with no access or never engage lowest shopping use except for clothes on credit
Devices – Higher than average broadband via cable TV and lowest mobile access possibly due to economic reasons
Demographic – Less affluent white British or high ethnic diversity communities in deprived urban neighbourhoods with high levels of unemployment and social housing

Promenade to Port CCT data

The IUC data for the CCT indicates a complete absence of the highest ranking groups that are most engaged with the internet and a predominance of the least engaged groups. One third of the CCT population are represented by IUC groups that are engaged with the internet, comprising 7% e-Veterans, 10% e-Mainstream and 16% Digital Seniors. The remaining two thirds of the population are in groups representing least engaged and unengaged with the internet, comprising 41% Passive and Uncommitted Users, 18% Settled Offline Communities and 8% e-Withdrawn.



When the IUC data is split into wards it highlights the differences in the demographics of the CCT communities.



The most deprived wards of Poulton and Harbour have the a quarter and a fifth of their population respectively in the most unengaged category e- Withdrawn, highlighting the severity of the deprivation in these wards. The majority of the Heysham North, Harbour and Poulton populations are in the Passive and Uncommitted Users group. Heysham South is the only ward to show a majority of internet engagement. The data for Bare highlights the aged population.