



MORECAMBE BAY

Coastal Community Team
Economic Plan
2017- 2022

Acknowledgements

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Document Format

This document follows the DCLG guidance for the production of an economic plan. Some of the 'Key Information' and the 'Communications' and 'CCT logistics' are provided in the appendices. Supporting data is provided as an appendix.

Image credits

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The team that have prepared this plan wish to continue to develop and refine the action plan for bid preparation and submission during 2017-18.

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Executive Summary

The ambition builds on the area's unique strengths to improve the visitor economy, liveability for communities and ensure the special assets are well cared for.

Morecambe Bay is like nowhere else in the UK. It's as invigorating as it is calming with spectacular natural beauty and a fascinating heritage.

It's an incredible internationally protected haven for wildlife and birds. It's a landscape borne of its people and traditions. It's a much-loved outdoor challenge.

It may have a lower profile than neighbouring National Parks, but it matches them with its large and beautiful area of spectacular land and seascapes, exceptional wildlife, hidden heritage, intriguing towns and villages and its huge range of widely accessible leisure activities.

The wealth of natural, historic and cultural assets are a driver for economic growth and an attractor for people to live, work and explore the area. They need to be managed carefully if they are to be sustained.

Ambition

We want the area to be a place that people choose to work, live and explore; a dynamic place that is full people who are proud to be there.

This plan seeks to address 3 key areas:

- Tourism - create a nationally recognised tourism and rural/coastal economy that promotes the special assets of the Bay.
- Liveability - create an area where people of all ages want to live.
- Heritage - ensure the area is sustainable and that the environment and assets that make it special and distinct are well cared for.



Key Issues

Severely unbalanced population



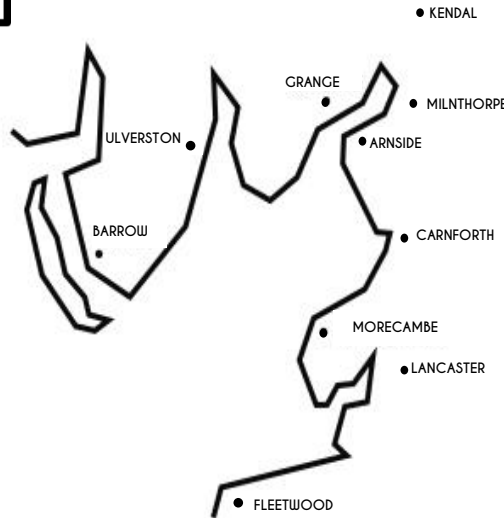
Declining working age population



Rising ageing population



Low wage rural/coastal economy



Most people travel over 5km to work



Outstanding nature and heritage assets



Lack of investment in public realm



Growing tourist economy

Morecambe Bay underperforms economically, yet there are significant opportunities for economic growth.

The Economic Situation - Bay wide

Morecambe Bay has a complex economic story to tell. Overall it is underperforming economically, but this is largely due to the economic situation of the biggest towns around the Bay – Barrow, Morecambe and Fleetwood. Although some of these areas contain a number of important industries, where significant investment is planned in the near future, the post industrial and post prime coastal resorts face a range of economic challenges.

Outside the towns, the economy generally performs more strongly with low unemployment, low levels of deprivation, residents employed in senior occupations and the social classification of residents significantly above the national average. However, the population is ageing dramatically, and there are pockets of deprivation and rural isolation found throughout the area.

Challenges

- Barrow, Morecambe and Fleetwood suffer from relatively high unemployment, poor health and low skill levels.
- Changing tourism trends have decimated Morecambe. As revenues plummeted, the tourism offer has not always kept up with customers' expectation of quality.
- Barrow suffers from an over-reliance on a single industry and has not yet capitalised on its outstanding natural environment.
- The age structures of rural coastal communities are severely unbalanced.
- Rural and coastal poverty and isolation tends to be hidden by large numbers of retired people.
- Smaller towns such as Ulverston, Arnside and Grange, although attractive, have failed to secure significant public funding and look somewhat dated and jaded.
- In the rural and coastal areas, wages are low and employment can be seasonal.



A key issue is the large number of older, retired people. This presents both challenges and opportunities.

The Economic Situation - Rural and Coastal areas

This plan provides the data and detail for the economic story of the coastal and rural area of Morecambe Bay outside the larger towns of Barrow, Morecambe and Fleetwood.

This is mainly the story of the residents rather than the area itself. The residents typically travel further to work than the national average and the employment available within the area is focused on those sectors which typically pay a lower wage.

There is a large amount of inbound and outbound commuting associated with the area with lower paid workers travelling in for work from the larger towns, and residents travelling large distances to undertake higher paid work in larger towns and cities across Cumbria and Lancashire.

A key issue, however, is that the population of the area is ageing and is significantly older than the national average. The high number of retirees and older people is seen as the principal economic challenge facing the area. We know that older people and retirees contribute positively to the area, but as numbers continue to increase, without action there is a genuine risk of a spiral of economic decline as social costs rise, retail and leisure spend falls and the working age population diminishes.

The solution to some of these issues may also sit with the retired population. They are well educated, highly skilled and often have a higher spending power. With support and infrastructure they could provide significant social capital.



Working age population shrinking - 17% aged 20-39



Population aged over 60 is growing



Low wage rural and coastal economy



76% of working population travel >5km to work

Key Actions

Managing the outstanding nature & heritage assets



Telling the story of the Bay area



Extending the visitor offer



Encouraging low carbon travel and exploration



Improving accommodation, food and drink



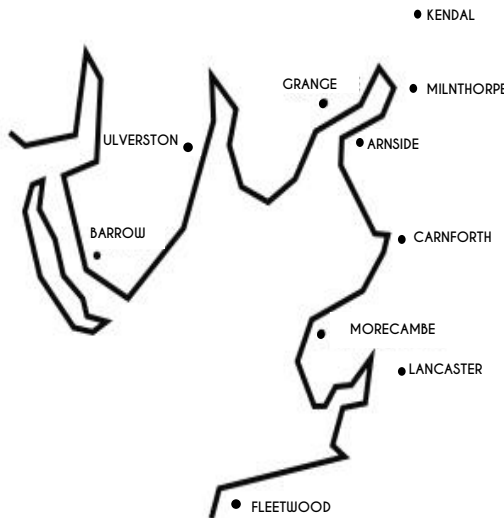
Developing skills



Investing in the public realm



Helping communities help themselves



Introduction

Building on 20 years of partnership working to deliver great results for the Bay's communities.

Morecambe Bay Coastal Community Team

The Morecambe Bay Coastal Community team (CCT) is a local partnership that supports communities around the Bay to collaborate and address the challenges that they face to help build a stronger Bay wide local economy.

This draft economic plan sets out the economic story for the Bay area, with a particular focus on the coastal and rural areas outside the big towns of Barrow, Morecambe and Fleetwood.

Through the plan the CCT will:

- Encourage greater partnership working.
- Support the development of local solutions to the economic issues facing the communities.
- Encourage the sustainable use of natural, heritage and cultural assets that support community activities and economic growth.
- Support and develop projects, working collaboratively to align and secure resources for delivery.

Morecambe Bay Partnership, in partnership with South Lakeland District Council has set up the CCT. Morecambe Bay Partnership has over 20 years of experience working with partners and stakeholders to bring benefits to the communities, heritage and environment around the Bay.

It is delivering a multi million pound programme, in partnership with others, that is transforming the way people think about Morecambe Bay. It has kick started the growth of the visitor economy based on the area's natural and cultural assets, is building capacity in local businesses and improving ways people can explore, enjoy and understand the area, including the award winning Bay Cycle Way.

The CCT comprises local government, business, education and 3rd sector members. The membership of the CCT is set out on page 33. The CCT will work alongside the Bays of Barrow & Furness, Morecambe & Heysham and Fleetwood CCTs on Bay wide projects and will collaborate with Cleveleys, Blackpool and South Copeland CCTs when opportunities arise.

Development of the Economic Plan

This economic plan builds on two decades of work by our committed partnership and has been developed from:

- A significant consultation exercise.
- The analysis of a large amount of economic data.
- Analysis of existing economic and thematic plans and strategies for the area.

The document is a living plan – its content will evolve as further comments are received. A final version will be published in Summer 2017.

The plan sets the context for the whole Bay area from Barrow to Fleetwood. However, the larger towns of Barrow, Morecambe and Fleetwood face different economic issues to the coastal hinterland between them. This plan provides more detailed insight into the coastal areas around these main towns. The economic plans for the Islands and Bays of Barrow & Furness, Morecambe & Heysham and Fleetwood CCT Action Plan set out the economic details for the larger towns.



Local Area

Morecambe Bay is nature's amphitheatre, with spectacular beauty, a globally important haven for wildlife, steeped in history and traditions. These assets are a key driver for the economy

Morecambe Bay is the largest intertidal area in the UK, with tidal islands, hidden beaches and exceptional heritage value. It is an outstanding landscape of a spectacular scale and grandeur and is a globally significant haven for birds. The Bay is flanked by farmland and woodland and many intriguing coastal towns and rural villages.

For centuries people have earned livelihoods from fishing, seafaring, trade and farming the coastal fringes. The coastal communities look towards one another across the Bay.

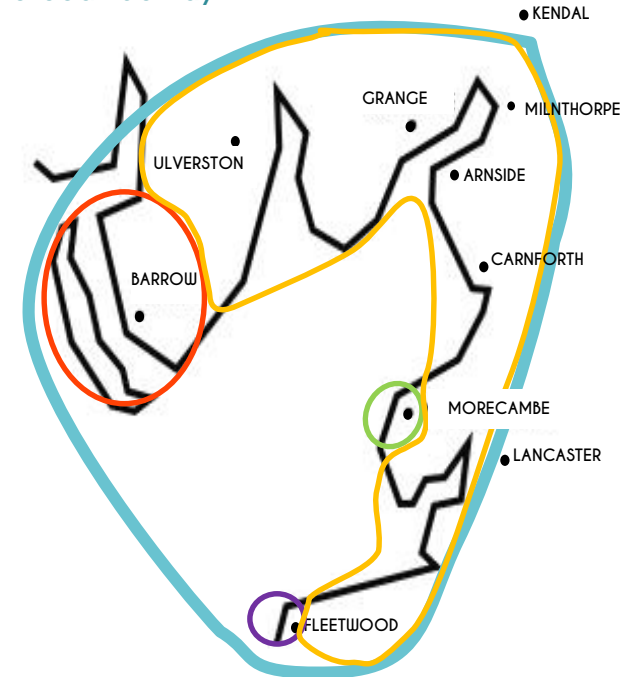
The area has 3 significant towns - Barrow, Morecambe and Fleetwood. Lancaster and Kendal lie inland and are key economic centres that influence the economy of the Bay area. The area is well connected to the north west of England by rail, road and M6 motorway.

Outside the larger towns, the 'rural' Morecambe Bay area stretches from the edge of Fleetwood, at Knott End, around the coast to Ulverston and the Furness Peninsula. The area encompasses the Wyre, Lune, Kent and Leven estuaries and has over 110km of coastline.

The communities around Morecambe Bay strongly associate with the Bay. They recognise and value a distinctive coastal character and identity, and the potential of the Bay to act as a unifying force to drive opportunity and investment. They also recognise that the Bay and its natural capital are a major asset that needs to be cared for.

Today's political boundaries split the area between Lancashire and Cumbria at a County level and across the four Districts of Wyre, Lancaster, South Lakeland and Barrow. The administrative divisions have made the area peripheral to political agendas in the past. However this is beginning to change with local authorities working together to better understand the economic potential of the Bay area.

Morecambe Bay



- Morecambe Bay CCT
- rural MB area
- Bays of Barrow & Furness Peninsula CCT
- Port to Promenade CCT
- Fleetwood CCT

Community

Morecambe Bay has a population of 419,000 with 72,000 living in the rural coastal communities.

Morecambe Bay's communities

The entire Morecambe Bay area stretches across four Local Authorities – Barrow, South Lakeland, Lancaster and Wyre, with a total population of 419,000. Put into context, the population is larger than Bristol or Cardiff.

Morecambe Bay Population	Population (rounded to nearest 1,000)
Morecambe Bay LAs	419,000
Principal settlements:	
Barrow-in-furness	57,000
Morecambe	35,000
Fleetwood	26,000
Ulverston	12,000
Carnforth	6,000
Grange-over-sands	4,000
Arnside	2,000
Silverdale	2,000
CCT Area:	
Population of rural CCT area	72,000

2011 Census

The area has a skewed population when compared to England as a whole. Like England, the largest group of people are aged 40-49 but in the Morecambe Bay Area the proportion of young people is significantly below that of England (see population pyramids overleaf).

The proportion of the population in the first half of their working career (20-39) is 22% in Morecambe Bay compared to 27% in England. There is also a large disparity between the proportion of people aged over 60, which is 29% in Morecambe Bay and 22% in England.

The population is much more severely unbalanced than England as a whole, with a higher ageing population and smaller number of people in the first half of their working life.

Morecambe Bay as a whole is an area where the average population age exceeds England, but this is further exacerbated when the rural coastal communities are considered in isolation.



The rural areas have a severely unbalanced age structure.

Strikingly 35% of the population is aged over 60.

Rural coastal communities

The rural area around the Bay is dotted with many small settlements located both along the coastal and estuary edges and in the rural hinterland. There are many very attractive areas, including Arnside & Silverdale Area of Outstanding Natural Beauty and parts of the Lake District National Park. The area is sparsely populated and the population is markedly older than the national average.

There is little doubt that the most striking economic characteristic of the community is its ageing nature. The population of England is normally considered to show ageing characteristics with the 40-49 year old group of residents representing the largest group in England. This is not the case around Morecambe Bay. There is a significantly older population.

The largest group of people are aged 60-69 years old. Over 35% of residents are over 60 whilst only 17% are in the early years of their working life (20-39 years old). The equivalent figure for England as a whole is 27%.

The area already has a large number of retirees and this is forecast to increase, having a profound effect on the social care issues for the area and the size of the local workforce. An older population still positively contributes to the economy of the area, but they might also spend less on retail and leisure which could impact on local economic vitality.

However, the solution to a more vibrant economy may also sit with the retired population. They are well educated, highly skilled and often have a higher spending power. With support and infrastructure they could provide significant social capital.

Population pyramids

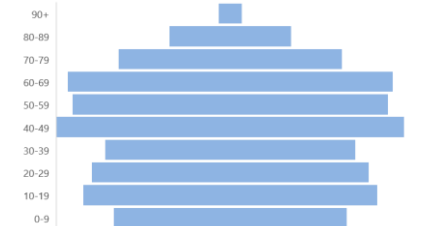
CCT Area

Age 20-39	17%
Age 60+	35%



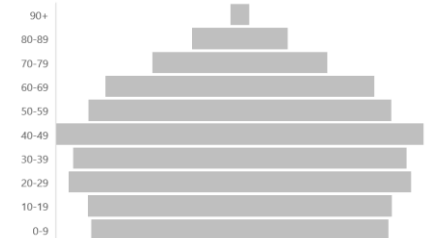
Morecambe Bay LAs

Age 20-39	22%
Age 60+	29%



England

Age 20-39	27%
Age 60+	22%



Economy

The economy has mixed characteristics with a high proportion of the workforce involved in manufacturing and maritime activities in the large towns and tourism related services in the coastal/rural areas.

Economy of Morecambe Bay

Economic statistics are not collected for Morecambe Bay as a whole. The economy cannot be viewed as one homogenous area. Analysis of the relevant data for the area shows the area as mid-ranking in terms of economic performance, however the economy of the area is very mixed.

Economic output is measured in terms of Gross Value Added (GVA). The GVA per head of population is captured for 99 areas in England. Against these 99 areas the areas around Morecambe Bay were ranked East Cumbria 47th, West Cumbria 56th, and Lancashire 69th.

On measurements such as unemployment all the Local Authorities have historically low unemployment, which has fallen in all cases since 2013. However there are contrasts between the larger towns and rural coastal areas – for example the proportion of working age residents claiming unemployment benefit in Barrow is 2.8%. This is 4 times higher than the proportion in South Lakeland (0.7%).

The differences between the Local Authorities are illustrated starkly when Indices of Multiple Deprivation are considered. Lancaster has one area which is ranked the 80th most deprived in England (out of 32,844) and Barrow-in-Furness has an area ranked 122. In contrast, South Lakeland's has much lower levels of deprivation with areas ranked between 10,329, and 31,219.

These differences are shown for a number of different measures. In Barrow-in-Furness 20% of the working age population are educated to degree level or above whilst in South Lakeland the proportion is 40%. The highest average resident salary can be found in South Lakeland at £29,619 compared to the lowest average salary in Wyre of £25,267.

When looking at the Bay wide picture, it is clear that a high proportion of the workforce is involved in manufacturing and maritime activities at levels 5 or 6 times higher than the national average for these sectors.

The area has a breadth of large employers and the table below highlights the importance of the Morecambe Bay gas field, submarine manufacture in Barrow, the port activities around the Bay, Kimberly Clarke's manufacturing plant in Barrow, Heysham nuclear power station and the GSK plant at Ulverston.

The top 10 sectors by Location Quotient (LQ)

2 Digit SIC Code	LQ
06 : Extraction of crude petroleum and natural gas	10.3
30 : Manufacture of other transport equipment	9.5
12 : Manufacture of tobacco products	8.8
50 : Water transport	7.5
03 : Fishing and aquaculture	4.7
17 : Manufacture of paper and paper products	3.7
55 : Accommodation	3.4
27 : Manufacture of electrical equipment	3.1
35 : Electricity, gas, steam and air conditioning supply	2.9
91 : Libraries, archives, museums and other cultural activities	2.5

Note: Location quotients (LQ) measure the proportion of the workforce in an industry compared to the proportion in the workforce nationally. A LQ of 4 indicates that the number of workers in that sector are 4 times the national average. The highest ranked LQs for the area are shown in the table above.

Small numbers of the workforce are employed in agriculture, forestry and land management. Although not in the Top 10, they are important to the rural coastal economy

Economy of the rural coastal communities

The rural coastal areas have many smaller employers in lower paid sectors. The top ten sectors of employment are shown in the table below. After education and retail, the largest sectors are related to the tourism economy - food & beverage service and the provision of accommodation. Residential care is also high reflecting the ageing population. Tourism and residential care sectors of the economy often have a high proportion of their employees on the minimum wage.

Top 10 sectors by employment – rural coastal villages

2 Digit SIC Code	Employment
85 : Education	2400
47 : Retail trade, except of motor vehicles and motorcycles	2300
56 : Food and beverage service activities	1700
55 : Accommodation	1700
87 : Residential care activities	1500
86 : Human health activities	1400
43 : Specialised construction activities	800
81 : Services to buildings and landscape activities	800
46 : Wholesale trade, except motor vehicles & motorcycles	700
27 : Manufacture of electrical equipment	700

Small numbers of the workforce are employed in agriculture, forestry and land management. Although not visible in the top 10 employment sectors, they are important to the rural and coastal economy. Providing food, space for sports and leisure and managing some of the natural assets that add quality and distinctiveness to the area.

The population in the rural coastal areas is very well qualified with almost a third holding a degree or equivalent qualification (27% for England as a whole) and therefore, perhaps unsurprisingly, the proportion of the workforce involved in senior management or professional roles is also high with 31% employed in roles of this type compared to 28% in England.



There are not enough people of working age living in the rural area to meet the service sector demand. People travel in to meet these demands, whilst people travel out to higher skilled jobs.

Economically, the ageing population is likely to have an impact on social care costs and also a reduction in local retail and leisure spend. Perhaps most striking will be the fall in the population of working age and the subsequent impact on the ability to hire staff. Already, the data suggests that high numbers of residents living outside the large towns and cities travel outside the area in search of higher paying work – the employment opportunities in the rural coastal areas tend to be in sectors which often pay less well.

Against many economic measures, the rural coastal area could be considered to be well-performing. The numbers of local residents registered as unemployed is low and has fallen 35% in the period 2013-2016. There are only 350 registered as unemployed in the area.

There are few parts in the rural coastal areas that could be classified as badly deprived – the Indices of Multiple Deprivation do not classify any part of the area in the lowest 20% of England – but do rank some areas in the 10% least deprived.

Of those living in the rural coastal area and who have a job, only 24% work within 5 km of their home – whereas the average for the Morecambe Bay area as a whole (including the larger towns) is 42%.

The headline statistics, however, do not tell the whole story. Unemployment may be low, but many people living in the area have more than one low paid job. There may be few badly deprived areas, however, there are pockets of deprivation found in towns and villages around the area. People feel isolated due to a lack of public transport and local services. There are not enough people of working age to meet the service sector demand. Well educated, highly skilled people travel out of the area for work and lower skilled people, from the larger towns, travel into the area to work in low paid jobs.

In addition, poor access to broadband and good mobile phone coverage, lack of public transport, and a lack of affordable housing all impact on the ability for communities to thrive.



Working age population shrinking - 17% aged 20-39



Population aged over 60 is growing



Low wage rural and coastal economy



76% of working population travel >5km to work

Note: The economic profile of the area is defined by Lower Level Super Output Area (LSOA) which are the small area building blocks for economic statistics. The LSOAs for the rural Morecambe Bay area are provided by map and list at Appendix C.

Visitor Economy

Morecambe Bay is a fast growing tourism destination.

Explore Morecambe Bay

Morecambe Bay is like nowhere else in the UK. It's as invigorating as it is calming with spectacular natural beauty and a fascinating heritage.

It's an incredible internationally protected haven for wildlife and birds. It's a landscape borne of its people and traditions. It's a much-loved outdoor challenge.

It is a fast growing tourism destination. Since 2013 the visitor economy has seen a:

- 10.6% increase in economic impact
- 3.3% increase in visitor numbers
- 4.8% increase in visitor days and nights

In 2015 there were:

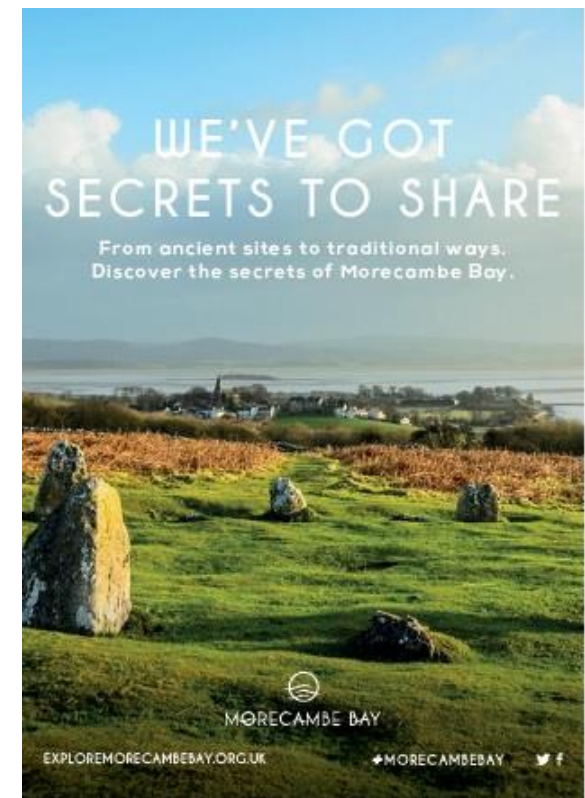
- 15.36 million tourism visits
- 13.82 million day trips
- 1.54 million overnight stays

The growth has helped to support almost 11,000 full time equivalent jobs and has generated £811 million to the local economy.

The growth in the tourism economy has been supported by skills training for accommodation and attraction staff, new attractions, including the award winning Bay Cycle Way, and promotion of the area by key businesses and organisations using the embryonic Morecambe Bay brand.

Despite recent growth more needs to be done to improve the quality of the visitor experience and ensure responsible tourism.

Explore Morecambe Bay is a website that promotes the Morecambe Bay brand enabling businesses to offer a new look and feel to share what the area has to offer others. It is supported by Marketing Lancashire and Cumbria Tourism but more work is needed to grow its potential.



Working together - Other CCTs

The 4 CCTs operating around the Morecambe Bay area will work together on Bay wide and transformational projects

Morecambe Bay CCT will work with the 4 other CCTs operating from the larger towns in the Morecambe Bay area. This plan provides overarching context to the area we all work in. All of our ambitions dovetail, especially in regard to using nature and history to unlock the economic potential of the area. Together we will look for opportunities to deliver transformational projects that benefit the Bay area's communities.

Bays of Barrow & Furness Peninsula CCT

This CCT is leading on work to connect people of Barrow with the natural beauty of the borough. The team is delivering small scale green infrastructure projects to address Barrow's socio-economic needs, reduce local health services funding gap and attract and retain skilled labour.

Promenade to Port CCT

This CCT is leading on work to revitalise the fortunes of the communities around Morecambe town and the Port of Heysham, building on the opportunities offered by the coast, promenade, port and the area's heritage.

Fleetwood CCT

The CCT is working to change the fortunes of the centre of Fleetwood. Connecting communities, shoppers and visitors with the historic town, its retail heartland and coastline.

Cleveleys CCT

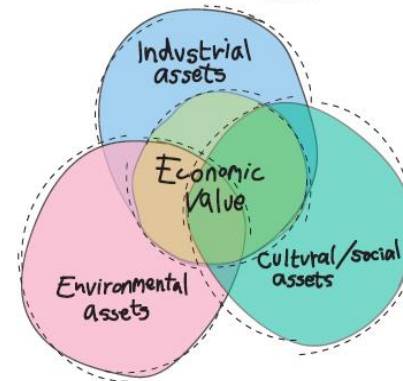
The CCT is working with retail businesses in the heart of Cleveleys to connect with communities, shoppers and visitors.

Developing the Promenade to Port CCT and plan



2016

Fleetwood Coastal Community Action Plan



*2 A general economic model for Barrow's assets
Neil McIntyre / CLES

From Bays of Barrow & Furness Peninsula CCT

Other Economic Plans and Initiatives

There are many initiatives working around the Bay area to unlock the economic potential based on the natural, cultural and historic assets.

In addition to the CCTs, there are many organisations and initiatives that are changing the fortunes of the Bay area. Here are just a few.

Local Authorities

The local authorities working around the Bay are committed to building a stronger economy for the area. South Lakeland District Council supported the set up of the CCT. They are fundamental in influencing and delivering infrastructure, housing and employment sites for growth and supporting the rural and coastal economy.

Local Enterprise Partnerships (LEP)

Cumbria LEP and Lancashire LEP operate in the area, each with a Strategic Economic Plan. They focus mainly on the major towns of Barrow, Morecambe & Heysham and Fleetwood and major transport infrastructure. Cumbria LEP's Rural and Visitor Economy Growth Plan has similar themes around connectivity and tourism.

Rural Development Programme for England – North Lancashire and Fells and Dales LEADER

Local Action Group plans to create jobs, help businesses grow and benefit the rural economy. Part funded by EAFRD.

Furness Economic Development Forum

A public, private sector partnership supporting economic growth of the Furness area and the key towns of Barrow and Ulverston

Chambers of Commerce & Growth Hubs

There are several Chambers of Commerce operating across the area with a range of initiatives to support local businesses. The Cumbria Growth Hub and Lancashire Growth Hubs provide support for the development of SMEs.

Ulverston BID

In Ulverston a Business Improvement District (BID) supports the town's traders and the town's rich tradition of hosting festivals.

Destination Management Organisations

There is support from the two destination management organisations that cover the area – Marketing Lancashire and Cumbria Tourism. Both are promoting activities across the Bay area, but are not always able to do so collaboratively.

Bay Tourism Association (BTA)

BTA is an independent voice of the tourism industry for the Morecambe Bay area, including its towns and rural surroundings. It supports and enables tourism businesses and providers to increase the economic benefits that flow from tourism. It helps to encourage responsible tourism.

Parish and Town Councils & Local Communities

There are also several initiatives, and active groups, at a single community level often led by Town or Parish Councils.

Arnsdale and Silverdale Area of Outstanding Natural Beauty (AONB) and Lake District National Park (LDNP)

The AONB and LDNP lie at the centre of the Bay area. Both have a management plan promoting economic activity that supports rural livelihoods and the sustainable visitor economy. The approach taken to managing these protected landscapes has resonance with the rest of the rural coastal parts of Morecambe Bay.

Morecambe Bay Local Nature Partnership (LNP)

The LNP is a partnership of environmental bodies and businesses. It is seeking to create a bright future for the area, acting as a catalyst for significantly improving the quality of the natural environment whilst connecting nature, businesses and communities. It has ambitious plans to unlock the economic potential of the area's natural assets.

Morecambe Bay CCT Plan and Ambition

The CCT Plan focusses on 3 key areas:

- Tourism
- Liveability
- Heritage

Ambition

The overall objectives for the area are:

- Tourism - Morecambe Bay will become a nationally recognised area for the visitor and rural/coastal economies.
- Liveability - The area will be a location where people of all ages wish to live.
- Heritage - Further development of the area is sustainable and cares for the natural environment which makes the area special.

Tourism - nationally recognised for the visitor and rural/coastal economies

Recent visitor studies have shown that the Morecambe Bay area is reasonably well known in the North West of England but with less recognition outside the region. As a result visitors tend to stay for relatively short periods of time.

Tourism has significant growth potential, and should be a key part of the coastal area's economic solution. But it needs investment. The work required in this area is not just about telling our story and promoting the area, we need to improve our infrastructure, skills and visitor offer.

Liveability - a location where people of all ages want to live

The ageing characteristics of the population and declining population present a number of challenges and opportunities. There is a need to train and skill younger people to improve labour market issues. There is a need to provide infrastructure for small businesses which could encourage greater entrepreneurship in all ages.

Social capital needs to be unlocked to help communities help themselves. Affordable housing, better transport, broadband and improved amenities need to be provided.

Addressing these can help improve the area's image and create a vibrant and thriving place for families to settle and young people to stay and build a career. Local Authority development plans provide the blue print for this.

Heritage - a location which is sustainable

The quality of the environment, the Bay and surrounding landscape, and the diversity of the flora and fauna are the very things which make the area unique and attractive to visitors.

Some of the landscape is maintained by conservation bodies, but much is managed through agriculture, forestry and estate management. The approaches advocated by the Morecambe Bay Local Nature Partnership and the AONB and LDNP management plans could help care for the area and improve its sustainability. Skills support could help encourage more young people to train in traditional land management techniques.

Infrastructure needs to enable people to live, work and visit the area sustainably. There needs to be support for alternative ways to explore the area than the car, and facilities need to be in place to encourage responsible tourism.

These are the themes against which the delivery plan is set. They have been developed following a review of current strategies and plans, demographic and economic data, a SWOT analysis and consultation with a range of stakeholders.

Key Actions

Managing the outstanding nature & heritage assets



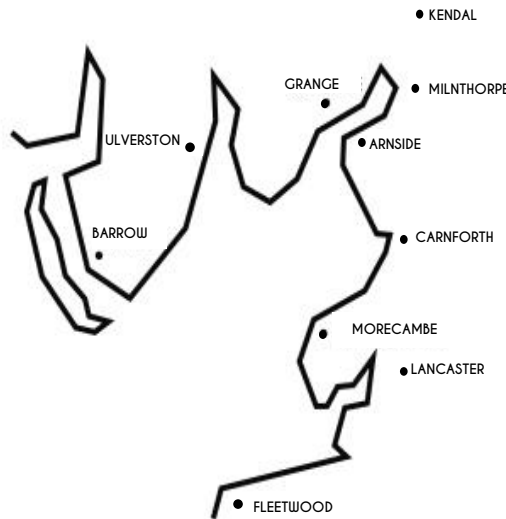
Telling the story of the Bay area



Extending the visitor offer



Encouraging low carbon travel and exploration



Improving accommodation, food and drink



Developing skills



Investing in the public realm



Helping communities help themselves

SWOT Analysis

Passionate people, high quality produce, an amazing environment and ease of access can help unlock the economic opportunities for the area.

Ambition	Strengths and weaknesses	Threats and opportunities
Tourism: Improve the tourism and rural/coastal economy offer	Established visitor economy. High quality tourism attractions. Significant natural, historic and cultural assets. Conservation bodies and large landowners with long term stewardship approach to land management Coastal rail line	Ageing workforce and low income from fishing, agriculture & forestry challenges the economy and the nature of the landscape Ageing guides in key tourism sectors Threat of losing long held traditions and attractions to the area
	Poor image and identity limit visitors and new residents Lack of quality accommodation in towns and rural areas Lack of skilled staff and guides High number of day trips with fewer overnight stays Poor public realm in small towns and villages Lack of information about the area when you're here Declining public bus transport Train services slow, infrequent, unreliable, rolling stock can be poor. Limited public transport to attractions.	High quality food produced in the area Growing demand for locally sourced products Marketing Lancashire promoting the food offer in Lancashire The promotion and understanding of natural, heritage and cultural assets. Committed and passionate partners willing to expand and manage the visitor offer Embryonic Morecambe Bay brand can be developed Community and business willingness to welcome visitors
Liveability: Create an area where people of all ages would want to live	High quality environment can attract people to live High quality jobs available in towns Rail line connecting coastal towns with key places to work and live	Stagnant and ageing populations could lead to spiral of decline. Loss of public transport – bus and train
	Ageing local population Declining working age population and migrating young people Shortage of affordable housing Poor broadband connections Declining public transport	A strong cultural offer can attract people to live. Strong Further and Higher Education offer in the area. Skills hubs developed and supported to provide training Significant projects planned for the area and the growth of the City of Lancaster provides the opportunity to retain students. B4RN and similar initiatives improving rural broadband
Heritage: A location which is sustainable	Conservation bodies and large landowners with long term stewardship approach to land management Coastal rail line Communities care for the area they live in	Improving visitor numbers could harm the very qualities that attract people to the area. Threat to remaining local business services
	Young people aren't attracted to farming traditionally	Build on the AONB and LDNP management approach to create an integrated framework and Bay wide visitor management plan. Heritage Coast 'designation'

Community Needs

Key areas to focus on are:

Improving the visitor offer

Improving skills

Improving transport and connectivity.

Objective	Tasks	Approach
Tourism: Improve the tourism and rural/coastal economy offer	Improve the visitor offer and its visibility Extending the marketing of the visitor offer. The Bay area has much to offer: cycling; walking, horse riding, including Cross Bay walks; exploring villages, estates and gardens; enjoying the landscape; heritage; wildlife; fishing; local festivals, and opportunities to build on the festivals offer and improve public realm.	Area perception figures maintained and improve year on year.
	Widening the offer with some development projects – some with few barriers to achieve and some involving longer term work.	Add an attractor of some type each year.
	Improving the accommodation and food & drink offer. The food & drink produced in the area is considered an important opportunity.	Provide business support to 50 tourism businesses per annum
	Improving skills Improving skills and creating clearer career pathways into sectors such as agriculture, land management and the visitor economy.	Develop a collaborative approach between employers and education providers. Develop project to build capacity in the visitor economy
Liveability: Create an area where people of all ages would want to live	Unlocking social capital There is a need to help communities to be able to do more to help themselves through community outreach programmes to support volunteers. This work will also make best use of the community assets.	Engage Parish / Town Councils and share best practice
	Improving transport and connectivity Those without access to a car are extremely isolated in many of the communities. Mobility is an important issue in sustaining communities.	Explore new approaches to community access – ‘smart apps’ and community provision
	Retaining young people The Economic opportunities of the whole Bay in terms of the scale of investment in energy, marine engineering and pharmaceuticals and the opportunities for employment in agriculture, land management and the visitor economy can be promoted in schools, colleges and the Universities.	Create a comprehensive economic narrative which better promotes the Bay.
	Some appropriate housing development should be enabled and its size, style and affordability should reflect the need to attract younger people into the communities.	This is supported but considered to be outside the remit of the CCT

Many of the principles of the AONB and National Park management plans are highly relevant and appropriate to the whole area

Objective	Tasks	Approach
Heritage: A location which is sustainable	Create an integrated management plan for the entire area building on the work undertaken by the AONB and the LDNP to set out some principles for development and management of resources within the Bay area.	Developing an integrated management plan building on what exists
	Facilitate greater use of public transport access to the Bay	Promotion and building the offer around access points
	There is a need to improve infrastructure within the Bay area	This is a lobbying activity for all Bay organisations



Data and Stakeholder engagement

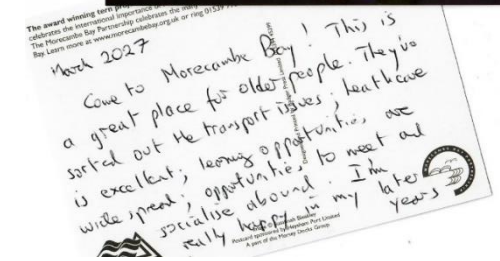
45 organisations have shared their ideas for a vibrant economic future for the area.

The data which underpins the plan is provided at Appendix C. A range of existing economic, housing, environmental management, tourism and community plans and strategies were also drawn on.

During the plan preparation 45 organisations and community representatives have shared their views and ideas with us. These are summarised below and are evidenced by the data review.

Key issues

- Ageing population
- Skills training for young people and wider workforce
- Pockets of deprivation in villages and towns
- Low paid jobs lead to people having more than one job
- Sustainable transport critical to success
- Infrastructure improvement needed – broadband, roads
- Railway is an asset, but better rolling stock needed
- Rural isolation - bus services in decline
- Affordable housing shortage
- Poor facilities, amenities and cultural activities to attract younger people
- Jaded public realm in many coastal villages
- Tourism development potential:
 - Bay wide brand and promotion of what's on offer
 - Improve information at 'entrance points'
 - Develop walking/cycling routes in a Bay wide series connected to railway stations and key villages.
 - Extend the Bay Cycle Way to Fleetwood
 - Develop events and festivals programme and central booking/ticketing
 - Local branding of English Coast Path – Bay Coast Path
 - Develop world class, high quality offer
 - Promote the natural and cultural assets of the area – wildlife a big draw.
 - Training for guides that cross the sands (Cockersands, Kent estuary, Leven estuary)
 - Bay wide food promotion/farmers markets



Postcards from the future – stakeholder visioning session



Delivering the Plan

Working in partnership around the Bay area to align resources and secure new sources of funding to deliver our ambitions

The Morecambe Bay Coastal Community Team is an influential team of key organisations, businesses and local communities working together in a collaborative way. We have been working together for a number of years under the remit of the Morecambe Bay Coastal Community Fund Board.

We will champion this plan and work with other partners, businesses and organisations to deliver its ambitions. The action plan that follows begins to identify some of the key project areas that could do this. We expect the delivery plan to change as new partnerships are formed and projects developed.

The delivery plan includes projects that are:

- Bay wide
- Located at multiple locations around the Bay
- Developed in one place but be transformational in nature
- Able to be led by a range of organisations.

The CCT has an excellent track record of attracting significant external funding from a wide range of sources and ensuring community and organisational support for major initiatives. In 2017 we are reviewing and expanding our membership to reflect the key economic needs of the Morecambe Bay area, as set out in this plan. We are committed to working together to align partner resources and secure additional funding for effective long term delivery.

The economic plan covers five years and when considered altogether represents a multi-million pound programme. The delivery of the plan is not down to a single deliverer but will involve the work of many different organisations – but each task that is taken forward will have a clear lead organisation identified.

Some of the issues facing the Bay's economy, such as housing and transport infrastructure, will be best delivered by statutory and key economic organisations, such as the Bay Powerhouse. The CCT will lobby these organisations to help ensure such issues are addressed.

Many of the tasks require time rather than capital investment and for these tasks in-kind support will be required of partners including the Morecambe Bay Partnership.

Other schemes will be dependent on external funding coming forward. Funding will be sought over the period of the plan from a range of bodies, such as the Local Enterprise Partnerships (Cumbria and Lancashire), the County Councils, the Local Authorities, Coastal Communities Fund, Big Lottery, Heritage Lottery Fund, LEADER, Dong Energy Walney Extension Fund, Arts Council and other foundations, trusts and programmes as they become available.



Action Plan

The projects which will be taken forward against the objectives for the CCT are set out in the table below. This is a working plan with the opportunity for consultees to add more actions to deliver the area's ambitions in the future – as well as refine the actions set out. The actions, when delivered, should make a real difference to the area. The suggested key partners and indicative timeframes, where available, are highlighted in brackets at the end of each action.

Objective	Tasks	Actions
Tourism: Improve the tourism and rural / coastal economy offer	Telling the story	<ol style="list-style-type: none"> 1. Better understand the motivations and characteristics of the visitors to the area, Lancashire and Cumbria through visitor economy surveys (<i>Destination Management Organisations (DMO) with support from CCT and adjacent CCTs</i>) 2. Develop the Morecambe Bay Brand and encourage all tourism related businesses to use it to promote the area. Support the development of subsets/subthemes to the Brand. (<i>CCT Lead, Local Authority, DMO and adjacent CCTs support, ongoing</i>) 3. Create a publicity campaign to promote the Bay at key railway stations on the Manchester and Yorkshire routes – and elsewhere – but specifically targeting rail arrivals. (<i>CCT Lead – summer 2018</i>) 4. Roll out a Bay wide interpretation strategy. (<i>MBP lead with partners</i>) 5. Encourage current attractions and businesses to promote other tourism opportunities within their literature and signage. (<i>CCT Lead – on-going</i>) 6. Improve the public realm in key villages and towns around the Bay. (<i>CCT Lead with Parish/Town Councils – long term</i>) 7. Encourage all operators across Morecambe Bay to feed into the 'events' section of the Explore Morecambe Bay website. (<i>DMO with CCT support – on-going</i>) 8. Develop a co-ordinated festival offer across the Bay building on existing strengths, avoiding duplication and using Morecambe Bay brand (<i>CCT and adjacent CCTs? – 2018 season onwards</i>) 9. Develop new festival offers around the Bay. (<i>CCT lead?</i>) 10. Explore opportunities linked to established tourism/place marketing platforms, activity and events to extend the reach for the Bay. (<i>CCT lead with DMOs</i>)
	Extending the visitor offer.	<ol style="list-style-type: none"> 1. Assist in the development and promotion of the English Coastal Way around Morecambe Bay -'The Bay Coast Way' – with loops and spurs to add interest to the linear coastal offer. (<i>Natural England, CCT Team and adjacent CCTs – 2017/18</i>) 2. Create 'explorer paths' from railway stations, at key villages, Lancaster Canal and other attractions to enable people to explore the area more. (<i>CCT Lead – 2018</i>) 3. Continue to develop family friendly facilities and routes for cyclists. (<i>CCT lead – 2017 – 2020</i>) 4. Develop further opportunities for all accessible paths and explorer routes and infrastructure to be developed. (<i>CCT lead, 2019-2021</i>) 5. Extend the Bay Cycle Way to Fleetwood and connect loops and spurs to attractions and local communities. (<i>CCT Lead – 2017</i>) 6. Undertake a full feasibility study for an Arnside to Barrow walking/cycling path including viaduct adaptation. (<i>CCT Lead – 2017/18</i>) 7. Redevelopment of the historic Lido site in Grange-over-Sands for non swimming leisure uses (<i>SLDC, with CCT Support, medium term</i>) 8. Support the development of major tourism attractions that seek to tell the story of the Bay and celebrate its history, nature and landscape/seascape. 9. Develop explorer 'apps' to help people explore, understand and enjoy the area.

Action Plan

Objective	Tasks	Actions
Tourism: Improve the tourism and rural / coastal economy offer <i>cont</i>	Improving the accommodation and food & drink offer.	<ol style="list-style-type: none"> 1. Collaborate with Marketing Lancashire to better promote the food and drink offer of the Morecambe Bay area, working with producers, chefs, retailers, butchers, farmers and growers using an umbrella marketing approach, such as 'Morecambe Bay Larder'. Consider using a DIT overseas event and small supportive funding to act as the catalyst (taste of Arran is a useful comparator). <i>(DMO with CCT Support – medium term)</i> 2. Widen the farmers market offer in key settlements using local food and drink as a driver – Ulverston, Grange-over-Sands, Carnforth and Pilling/Glasson (Cheshire Artisan Market is a useful example). <i>(CCT Lead - 2018)</i> 3. Work with established and aspiring tourism businesses to develop their offer by providing 'master-classes' by professional firms who are likely to see the opportunity to promote themselves. <i>(CCT Lead)</i> 4. Develop a dialogue with higher end chains providing accommodation and food offer outlining the areas potential. <i>(CCT Lead)</i> 5. Develop opportunities to improve accommodation offer.
	Improving skills and creating clearer career pathways into sectors such as agriculture, land management and the visitor economy.	<ol style="list-style-type: none"> 1. Work with skills hubs, colleges and universities to encourage more businesses to take part in skills development programmes to promote future tourism, agriculture, animal and land management, sailing and maritime skills. <i>(CCT Lead to kick start – long term Skills hub and/or FE project)</i> 2. Work with skills hubs and training providers to help smaller businesses combine work experience opportunities for trainees– broadening the interest and experience for the trainee and easing the burden on the trainer whilst still allowing them to work with potentially new talent. <i>(CCT Support)</i> 3. Continue skills training to attractions and tourism businesses to offer a warm welcome to visitors and encourage people to stay longer. <i>(DMOs with CCT Support)</i> 4. Develop a guiding qualification for cross bay/sands walks and support new people to be trained as guides. <i>(CCT lead with LA support? – 2018-20)</i> 5. Work to promote rural / coastal economy opportunities as a second career – to those made redundant through Job Centre Plus in the adjacent larger settlements – or those just wanting a change of direction. <i>(CCT Support)</i> 6. Encourage entrepreneurialism by early retirees <i>(CCT Support)</i> 7. Support improved broadband, linking willing communities into alternative providers to provide long term economic benefits. <i>(CCT Support)</i>
	Undertake other market demand studies	<ol style="list-style-type: none"> 1. Undertake a feasibility study to assess the potential market demand for showcasing other aspects of the Bay. This could include the Carnforth steam heritage offer, further heritage attraction at Glasson Dock, the visitor attraction within the renewed Lido site. <i>(CCT Support)</i>

Action Plan

Objective	Tasks	Actions
Liveability: Create an area where people of all ages would want to live	Helping communities to help themselves	<ol style="list-style-type: none"> 1. Support community volunteers to run activities for residents – whether making them aware of events, running weekly clubs/activities, running the library, promoting events and other community based activities. These tend to be more successful when a community asset (village hall etc.) can be made available. <i>(CCT kick start with community partners)</i> 2. Community projects that can focus on well-being and exercise for older residents. <i>(CCT kick start with health and community partners, 2018)</i> 3. Improving digital health provision and information. When primary and secondary health providers enter a dialogue concerning sharing of information and more digital monitoring, the community support centres could provide residents with information about digital health opportunities. <i>(CCT Support)</i>
	The Economic opportunities of the whole Bay in terms of the scale of investment in energy, marine engineering and pharmaceuticals and the opportunities for employment in agriculture, land management and the visitor economy can be promoted in schools, colleges and the Universities.	<ol style="list-style-type: none"> 1. A new promotional economic narrative of the whole economic picture of the Bay can be summarised and provided to schools, colleges and employers to use widely. <i>(CCT support)</i> 2. The economic narrative can also be provided to both Local Enterprise Partnerships helping to create an alternative economic outlook for the Bay area which avoids every economic statistic being sliced in two and diminishing how the area is perceived. <i>(CCT support)</i>
	Providing housing development of appropriate size, style and affordability to reflect need and to attract younger people into communities.	This is an important action for the area but dependant on Local Authorities and the planning system. The CCT will lobby appropriate groups/organisations to deliver this ambition.
	Improve accessibility and reduce rural isolation. Mobility is an important issue in sustaining communities.	<ol style="list-style-type: none"> 1. Undertake a feasibility study to look at an 'app based' demand management tool for community transport provision on demand (a rural Uber). This is a rapidly developing aspect of mobility planning. <i>(CCT support)</i> 2. Support the development of community bus routes and facilities.

Action Plan

Objective	Tasks	Actions
Heritage: A location which is sustainable	Develop an integrated management plan for the entire area	<ol style="list-style-type: none"> 1. Building on the AONB and National Park management plan approach to create an integrated management plan which sets out the broad 'principles' for managing the Morecambe Bay area. <i>(CCT lead)</i> 2. Explore the potential for 'designating' Morecambe Bay as a Heritage Coast. <i>(CCT lead with Natural England, 2018/19)</i>
	Connecting communities and low carbon travel	<ol style="list-style-type: none"> 1. Scope and support development of more active travel throughout the area supporting a shift towards low carbon travel <i>(CCTs, LAs, LDNPA, AONB, 2018)</i> 2. Promote access by rail, bus, bike, and walking. Link car-parks and rail stations to cycle access/bus routes/mobility devices/well signposted walking trails to encourage greater dwell time and reduce the reliance of intra-Bay car journeys by visitors. <i>(CCT Lead, LAs, LDNPA, AONB, 2019)</i>
	Wider infrastructure.	<ol style="list-style-type: none"> 1. The provision of rail time-tabling and rolling stock, A590 improvements, mobile and broadband coverage and consideration of new rail access (re-linking Carnforth to the Lake District). Although these are all seen as an important actions for the area they are large scale and beyond modest remit of the CCT.

Action Plan – 1- 2 years

The next 6 months can be about planning for the more complex areas of work, achieving some early wins and building on previous work

Short term goals / actions and performance measures – 1- 2 years

Action	Performance measures
Identify organisations that can lead on action delivery with support from the CCT.	Lead organisations filled
Develop the 'Morecambe Bay brand' and encourage more businesses to use it.	Take up of brand
Encourage current attractions and businesses to promote other tourism opportunities within their literature and signage.	Linkages created
Work with DMOs and local authorities to identify website host for 'events' creating a 'must visit' resource for residents and visitors alike.	Appropriate host identified and number of events listed
Assist in the development and promotion of the English Coastal Way around Morecambe Bay – the Bay Coast Way, along with the development of loops and spurs.	Bay Coast Way and loops and spurs planned
Creating 'explorer paths' around railway stations, key villages/towns and Lancaster Canal.	Explorer paths planned
Scope and support development of more active travel throughout the area supporting a shift towards low carbon travel.	Scoping study completed
Widen the farmers market offer in key settlements using local food and drink as a driver – Ulverston, Grange-over-Sands, Carnforth and Pilling/Glasson.	Markets held
Building on the AONB and National Park management plan approach to create an integrated management plan which sets out the broad 'principles' for managing the Morecambe Bay area.	Plan fully disseminated Y/N
Identify communities interested in developing community volunteer and assets and the potential to create hubs.	All Parish / Town Councils contacted Y/N
Plan how the remaining actions can be delivered by the CCT and understanding who may lead on those elements which are not seen as having the CCT as the lead.	Plan for 6 months – 5 years in place Y/N

Action Plan – 2- 5 years

The work over 5 years will be partly determined by the success of earlier initiatives.

Medium term goals / actions and performance measures – 2-5 years

Action	Performance measures
Create a publicity campaign for the Bay which could work to promote the Bay at key railway stations.	Campaign achieved Y/N
Assist in the development and promotion of the English Coastal Way around Morecambe Bay – the Bay Coast Way, along with the development of loops and spurs.	Paths established
Creating 'explorer paths' around railway stations, key villages/towns and Lancaster Canal.	Explorer paths established
Improve public realm in the settlements identified as most in need of improvement.	Public realm improved
Undertake a full feasibility study for the Arnside to Barrow path including viaduct conversion to cycle / footpath.	Feasibility study completed
Undertake relevant additional market studies as proposals come forward.	Feasibility studies completed
Collaborate with Marketing Lancashire to kick-start a campaign to better promote the food and drink producers of the area as an umbrella marketing approach.	Interest assessed and network established
Develop the co-ordinated festival approach and the development of new festivals.	A coordinated programme in place
Arrange 'master-classes' for existing/aspiring tourism businesses by professional firms.	Providers identified and programme started
Develop a dialogue with higher end chains providing accommodation and food offer outlining the areas potential.	Mini 'inward investment' campaign leads generated
Work with businesses interested in skills development programmes to potentially find new talent and link them into a college and university network.	Network established and student placements achieved
Provide some 'Kick-start' support to help volunteers run a number of activities for residents in the communities that express an interest.	Number of community hubs
Undertake a feasibility study to look at an 'app based' demand management tool for community transport provision on demand.	Feasibility study completed



MORECAMBE BAY

Coastal Community Team

Draft Economic Plan - Appendices



App A: Coastal Community Team contacts and members

Morecambe Bay Coastal Community Team – Key information		
Key contact:	Jenny Wain, Fundraising and Development Officer	Morecambe Bay Partnership, Unit 19c, The Factory, Castle Mills, Aynam Road, Kendal, LA9 7DE, 01539 734888 or 07505962212, jenny@morecambebay.org.uk
CCT Membership – Board	Richard Greenwood – Chair Susannah Bleakley Ruth Leahy, Economic Development Cllr Ian Stewart, Cllr Helen Wall Martin Allman Anne Marie Harrison, Economic Development Ian Stephens, Executive Director Justina Ma, Business Manager Roger Carter, President Places to be filled: Further/Higher Education, blue chip business, private sector business	Morecambe Bay Partnership Morecambe Bay Partnership South Lakeland District Council Cumbria County Council Cumbria County Council Lancaster City Council Cumbria Tourism Marketing Lancashire Bay Tourism Association
CCT Membership – Stakeholders and other CCTs in the Morecambe Bay area.	A wide range of partners and stakeholders have been involved in the development of the economic plan and action plan. More partners will be involved in working groups, and the development and delivery of projects as the CCT programme develops. The list of stakeholders includes those involved to date, and who are likely to be involved in the future.	<p>Stakeholders Arnside & Silverside AONB, Barrow Borough Council, Community Rail Partnerships, Cumbria LEP, Cumbria Wildlife Trust, Cumbria Association of Local Councils, Cumbria Tourism, English Heritage, Environment Agency, Forestry Commission, Furness College, Furness Economic Development Forum, Holker Estates, Kendal College, Lake District National Park, Lancashire Association of Local Councils, Lancaster City Council, Lancaster Council for Voluntary Services, Lancashire LEP, Lancaster University, Landowners, Marketing Lancashire, Morecambe Bay Local Nature Partnership, National Trust, Natural England, Parish and Town Councils, RSPB, South Lakeland District Council, Sustrans, University of Cumbria, Virgin Rail, Wyre Borough Council.</p> <p>Neighbouring CCTs and Coastal Partnerships Bays of Barrow and Furness Peninsula CCT, Promenade to Port CCT, Fleetwood CCT, Cleveleys CCT, South Copeland CCT, Blackpool CCT, Duddon Estuary Partnership.</p>
Accountable Body	South Lakeland District Council	Gareth Candlin, Economic Development Programme Manager South Lakeland District Council, South Lakeland House, Lowther Street, Kendal, Cumbria LA9 4DQ, 01539 733333 or 01539 793382, gareth.candlin@southlakeland.gov.uk . Member of CCT Board – Ruth Leahy

App B: Communications, Logistics and Management

Key Information	
Consultation, stakeholder engagement and community involvement	<p>During the preparation of this economic plan numerous local stakeholders were consulted. Individual consultations were carried out by telephone or by face-to-face meetings. In addition, three consultation events were held at different locations across the area. Consultation findings from other relevant local projects have been incorporated into this plan and will continue to be so. We see the Economic Plan as a living document which will regularly be updated/reviewed based on evidence from further consultations.</p> <p>We will continue to consult with key local stakeholders both broadly and on a project by project basis. Consultation will be carried out by various methods – events, individual consultations, online, paper etc. We will involve and inform partners and other bodies through a variety of methods including: direct communication with local town/parish council representatives as well as representatives of other key interest/community groups; attendance at associated board/council meetings where relevant; direct email and telephone communications with named contacts at DCLG/CCA etc.</p> <p>We will also promote the work of the CCT on the MBP website/partner websites; social media, attendance at selected public events. We will also explore the possibility of other communication methods as we move forward including a potential open/launch day/exhibition of plans/projects.</p>
Management of team	The Morecambe Bay Coastal Community Team will be governed by a board of key stakeholders that will emerge from the existing Coastal Community Fund Board. Morecambe Bay Partnership will provide the secretariat. Meetings will be held quarterly. The full standard operating procedures and final membership will be confirmed by December 2017.
Support structure	Morecambe Bay Partnership will provide supporting structures through its secretariat role. Economic development support will also be provided by South Lakeland District Council.
Costs and Sustainability	At this stage running costs of the CCT itself will be absorbed by the Morecambe Bay Partnership. Moving forward, running costs will be built into each project on a project by project basis.
Areas of Specific Interest	Arts, tourism, housing, promenades, heritage, marketing, sport, transport, health and well being.

App C: Data

The data presented in the pages which follow, support the conclusions drawn in the report and have been largely referenced in the main body of the report but are provided here as a statistical annex to the work that has been completed.

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Data

The CCT population is better qualified than in England as a whole – a larger proportion are qualified to degree level or equivalent (32.4%) than in England (27.4%).

Data

The source of the data is mainly 2011 census data built from individual small geographic areas of analysis, with the addition of employment data from the Annual Business Register and Employment statistics, unemployment data from the Claimant Count statistics and the Indices of Multiple deprivation statistics.

The data is based on an average for rural and coastal parts of Morecambe Bay. Even within this specialised geography some areas have slightly different characteristics. Nevertheless, the nature of the area is considered sufficiently similar in terms of statistics that the general data provides a good overview.

Data isn't broken down by town.

The key data findings are that:

- The Morecambe Bay area as a whole has an ageing population but for the CCT area in particular, the proportion of residents aged over 60 is 35% and this is likely to get larger. This proportion is more than 50% higher than the proportion of over 60s recorded in England.
- The population of each Local Authority in the area has grown less quickly than England since 1981 and in the case of Barrow-in-Furness the population has been in decline.
- The Office of National Statistics population projections forecast a reduction in the population aged 18-68 in each of the four Local Authorities studied.

- The CCT area in particular has a low level of ethnic diversity – 98.5% of the population are white and 96.5% were born in the UK.
- Of those people of working age, very few are claiming unemployment benefit and on this measure the CCT area is at virtually full employment. When the wider Morecambe Bay Local Authorities are considered, Barrow and Lancaster record higher proportions of unemployment claimants but by historic standards the numbers are very low (below 3% of the working age residents).
- In the CCT area, of those working, more than half (52%) travel more than 5km to work and this is higher than the average for England (46%) and higher than for the Morecambe Bay Local Authorities.
- The CCT population is better qualified than in England as a whole – a larger proportion are qualified to degree level or equivalent (32.4%) than in England (27.4%) and a smaller proportion have no qualifications (20.1% versus 22.5%). The CCT population is better qualified than the wider Bay area where, for example, only 20% of residents of Barrow-in-Furness are qualified to degree level.
- Linked to the nature of the qualifications of the resident population, 30.9% of the CCT resident population is in employment classed as managerial or professional (the figure for England as a whole is 28.4%).

Residents of the CCT area are leaving the area to find work and the workers filling many of the jobs available are travelling into the area.

- Within the wider Morecambe Bay the emphasis on manufacturing results in skilled trades employing a higher proportion of residents – 14.4% of residents (compared to 11.4% in England).
- According to the Acorn classification of residents, 26% are classified as A or B on the social scale in the CCT area whereas the figure for England is 22.9% (and 18.8% for Cumbria).
- The employment within the CCT area tends, however, to be in those areas of the economy which often pay lower wages – retail, tourism and residential care. The inference is that the residents of the CCT area are leaving the area to find work and the workers filling many of the jobs available are travelling into the area.
- These sectors are also typically the largest employers across the whole of Morecambe Bay – but manufacturing, energy and maritime industries are also important across the wider area.
- There are few areas classed as deprived within the CCT area but living environment is measured as a challenge in some rural / coastal locations and this is linked to access to services. Across the whole area 13% of the population do not have access to a care. Given the restrictions on public transport in many rural and coastal areas, this is likely to lead to a sense of isolation for some residents.



Data: population change

The ageing characteristic of the workforce is the single most important economic finding for the area

The report has set out the issues relating to population and the ageing characteristics of the workforce. Economically this is likely to be an extremely important issue, not simply because of the difficulty of providing support for such a concentration but also because of the likelihood that the workforce will decline and the spending profile of an ageing population impacts on retail and leisure providers and the sustainable provision of these activities.

The charts on the pages which follow are only provided at a Local Authority level (annual population estimates and forecasts are not provided at a smaller geographic level).

The charts demonstrate that since 1981 the long term trend has been for the population of all four of the Local Authorities considered (Barrow-in-Furness, South Lakeland, Lancaster and Wyre) to grow less fast than the average for England although in the case of all apart from Barrow the population grew in line with England until 2008 (and the start of the recession). Barrow-in-Furness, however, has had a population that has declined fairly steadily since 1986. it is the only Local Authority which has recorded a decline over the period.

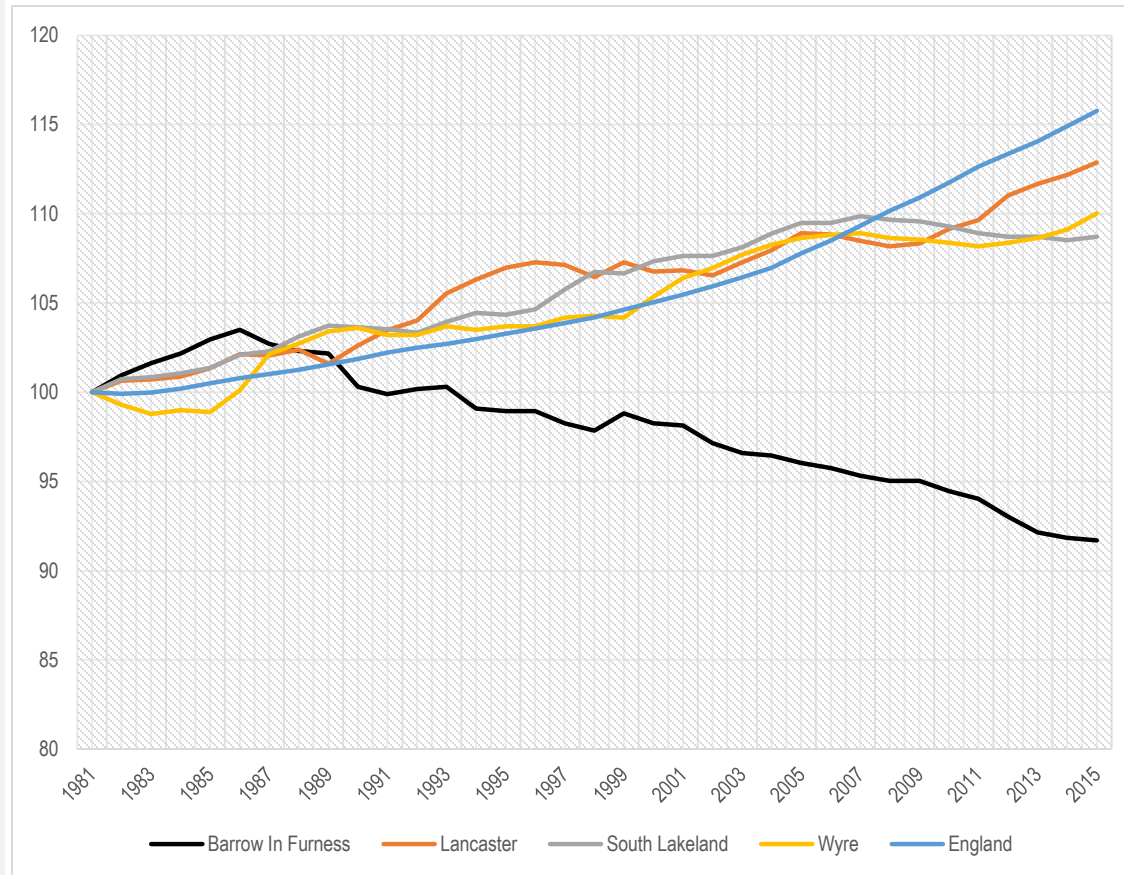
When the future population projections, prepared by the Office of National Statistics, are considered, each of the Local Authorities around Morecambe Bay are forecast to record population growth below that of England – in fact in the case of Barrow-in-Furness a further decline is forecast.

The result of this poor growth and the age of the current population means that when the population aged 18-68 is considered, the scale of this sector of the population falls in each case.

Data: population change

The population growth of England only out-paced Lancaster, Wyre and South Lakeland from 2007 / 2008. Barrow, conversely has suffered population decline

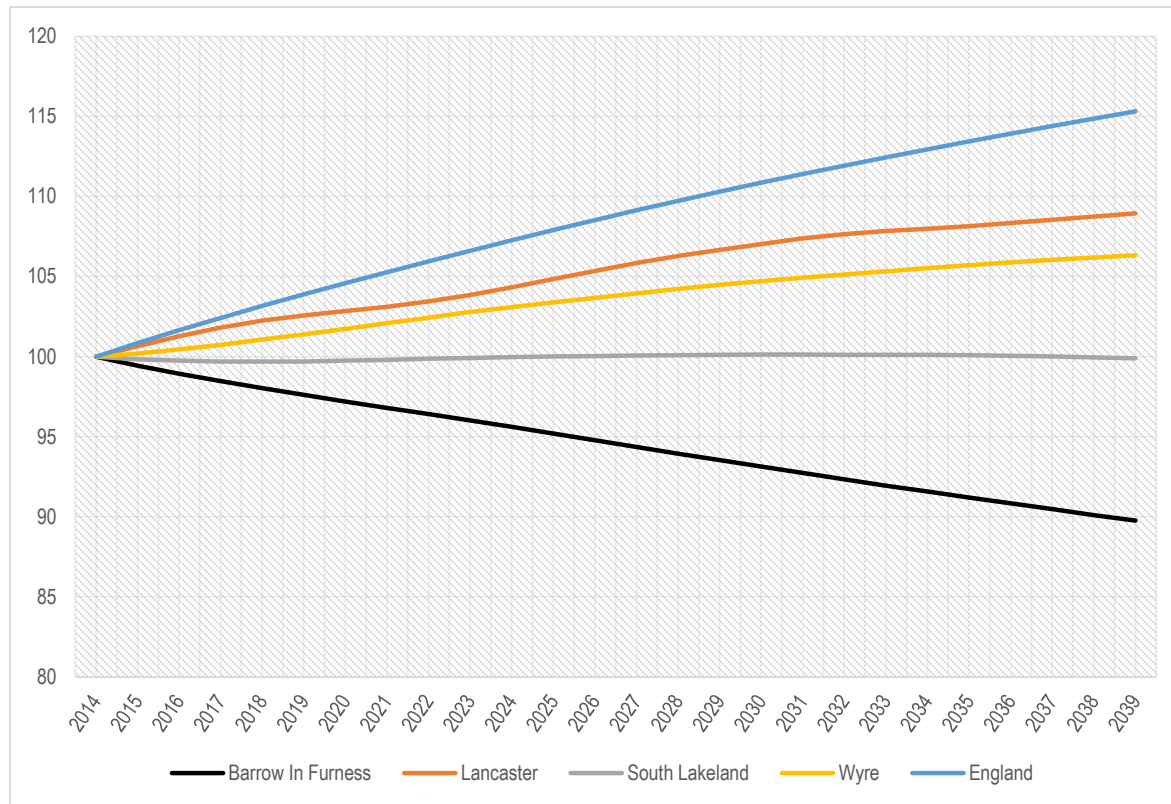
Indices of Population Change 1981 (=100) to 2015



Data: population change

None of the Local Authorities are forecast to record population growth at the same pace as England in the period to 2039

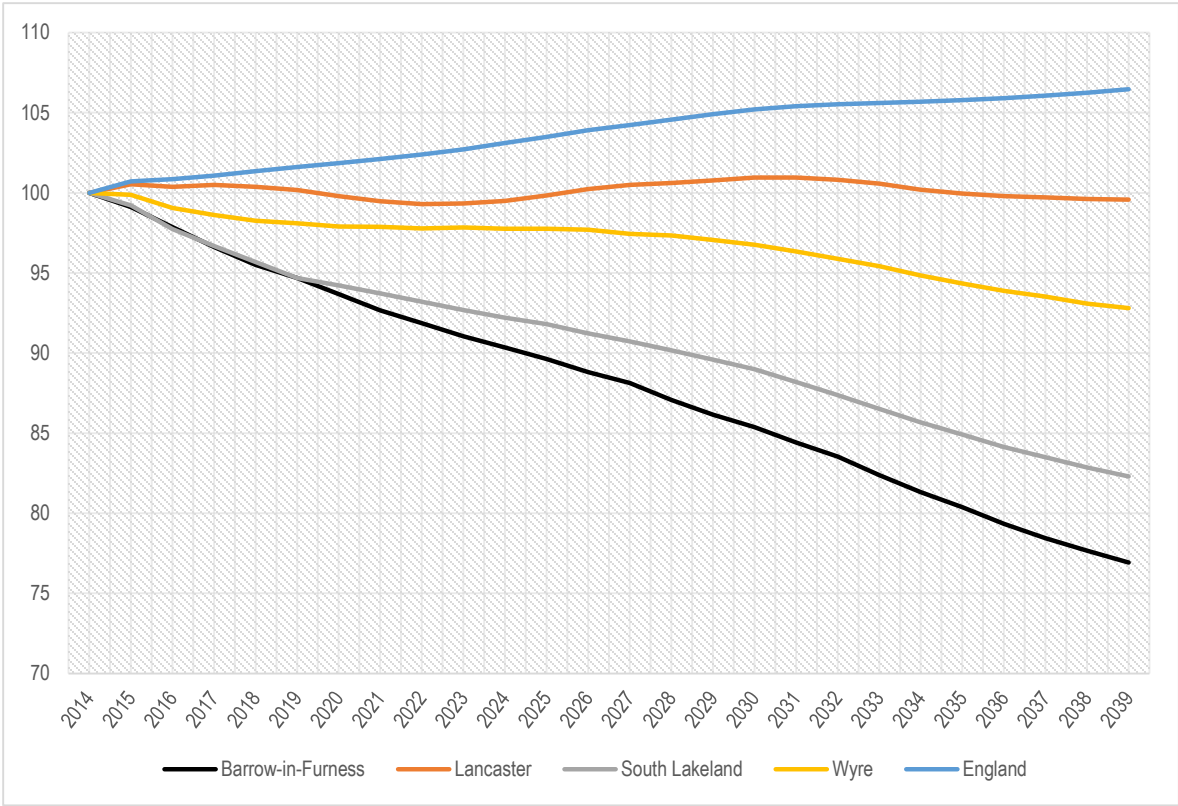
Indices of Projected Population Change 2014 (=100) to 2039



Data: population change

In the period to 2039 the population aged 18-68 is expected to decline in all of the Local Authorities – dramatically so in South Lakeland and Barrow-in-Furness

Project 18-68 year old population 2014 (=100) to 20139



Data: migration and ethnicity

One of the factors behind slow population growth is the lack of migration into the area

One of the reasons for the lack of population growth across the area has been the low recorded rate of migration. Within the CCT area 96.5% of residents were born in the UK. In addition, the population is very homogeneous with 98.5% recorded as white. The lack of migration and the lack of ethnic diversity is likely to limit the introduction of new working practices, innovative ideas and economic vibrancy.

Even when the whole of the Morecambe Bay area is considered and the more urbanised areas are included in the figures, the area is considerably less diverse than England as a whole.

Length of time in UK	Morecambe Bay CCT	Morecambe Bay CCT %	Morecambe Bay LAs %	Cumbria %	Lancashire %	England %
Born in the UK	69287	96.5	95.0	96.3	93.5	86.2
Resident in UK: Less than 2 years	266	0.4	1.0	0.5	0.8	1.8
Resident in UK: 2 years or more but less than 5 years	387	0.5	0.9	0.7	1.0	2.2
Resident in UK: 5 years or more but less than 10 years	434	0.6	0.9	0.7	1.1	2.9
Resident in UK: 10 years or more	1412	2.0	2.2	1.8	3.6	7.0

Ethnic Background	Morecambe Bay CCT	Morecambe Bay CCT %	Morecambe Bay LAs %	Cumbria %	Lancashire %	England %
White	70715	98.5	97.4	98.5	92.3	85.4
Mixed/multiple ethnic groups	370	0.5	0.7	0.5	1.1	2.3
Asian/Asian British	499	0.7	1.5	0.8	6.1	7.8
Black/African/Caribbean/Black British	134	0.2	0.2	0.1	0.3	3.5
Other ethnic group	68	0.1	0.1	0.1	0.2	1.0

Data: sectors of employment

The sectors which employ the most number of people reflect both the importance of tourism to the area and the ageing demographic

In terms of absolute scale, the largest sectors of employment in the CCT area are education, retail, food and beverage activity, accommodation and residential care. These 5 sectors account for 7,100 employees in a total working population estimated at 26,000.

The working age population of the CCT area is in excess of 40,000 and with negligible unemployment rates the statistics suggest a significant net number of people out-commute from the area.

The sectors which employ the most number of people reflect both the importance of tourism to the area and the ageing demographic. The CCT area contains 12% of the retail employment recorded across the Morecambe Bay Local Authorities but 23% of the residential care employment.

The largest sectors in absolute employment within Morecambe Bay are similar to the CCT area with the exception of health – the CCT area does not contain a hospital. The data for the wider area also, importantly, picks up the submarine yard in Barrow which is a major employer for the area.

The relative importance of different sectors can be analysed further by considering location quotients which are shown overleaf.

CCT Area

2 Digit SIC Code	Employment
85 : Education	2400
47 : Retail trade, except of motor vehicles and motorcycles	2300
56 : Food and beverage service activities	1700
55 : Accommodation	1700
87 : Residential care activities	1500
86 : Human health activities	1400
43 : Specialised construction activities	800
81 : Services to buildings and landscape activities	800
46 : Wholesale trade, except of motor vehicles and motorcycles	700
27 : Manufacture of electrical equipment	700

Morecambe Bay LAs

2 Digit SIC Code	Employment
47 : Retail trade, except of motor vehicles and motorcycles	20000
85 : Education	20000
86 : Human health activities	12900
56 : Food and beverage service activities	11400
55 : Accommodation	7900
30 : Manufacture of other transport equipment	6900
87 : Residential care activities	6600
88 : Social work activities without accommodation	5800
43 : Specialised construction activities	5300
46 : Wholesale trade, except of motor vehicles and motorcycles	5000

Data: sectors of employment

In the Morecambe Bay CCT there are a number of industries where there is a dramatically higher concentration of activity

Location quotients measure the proportion of employment in an area and compare it to the proportion of employment in a wider area – in this case England. Hence a location quotient of 2 would suggest that double the number of people work in an industry compared to the national average. Location quotients are therefore useful in considering where there is an unusually high or low level of employment.

In the Morecambe Bay CCT there are a number of industries where there is a dramatically higher concentration of activity – and these are:

- Extraction of natural gas (industry servicing the Morecambe Bay gas field close to Heysham)
- Manufacture of pharmaceuticals (GSK at Ulverston)
- Manufacture of electrical equipment
- Electricity, gas, steam and air conditioning supply

These industries each employ at least 6 times more than the national average.

In addition employment relating to accommodation and therefore supporting the tourism industry employs 4.5 times the national average but unusually for a tourism led economy, food service only employs 1.1 times the national average (not shown).

In the wider area the same trends are picked up – and with the addition of port activities and the submarine yard. It can be seen that the manufacturing, energy and marine activities are strong.

NB: Compared to England

CCT Area

2 Digit SIC Code	LQ
06 : Extraction of crude petroleum and natural gas	65.8
21 : Manufacture of pharmaceutical preparations	11.1
27 : Manufacture of electrical equipment	9.3
35 : Electricity, gas, steam and air conditioning supply	6.8
55 : Accommodation	4.5
91 : Libraries, archives, museums and other cultural activities	4.4
08 : Other mining and quarrying	3.2
26 : Manufacture of computer, electronic and optical products	2.9
32 : Other manufacturing	2.9
17 : Manufacture of paper and paper products	2.9

Morecambe Bay LAs

2 Digit SIC Code	LQ
06 : Extraction of crude petroleum and natural gas	10.3
30 : Manufacture of other transport equipment	9.5
12 : Manufacture of tobacco products	8.8
50 : Water transport	7.5
03 : Fishing and aquaculture	4.7
17 : Manufacture of paper and paper products	3.7
55 : Accommodation	3.4
27 : Manufacture of electrical equipment	3.1
35 : Electricity, gas, steam and air conditioning supply	2.9
91 : Libraries, archives, museums and other cultural activities	2.5

Data: travel to work

A greater proportion of residents work more than 5km from home or work from home than the average for England

The working population within the CCT area are less likely to live within 2km of their workplace than in England – and significantly less than if they live elsewhere in the Morecambe Bay area – although a higher proportion than in England as a whole work from home.

The population of the area is more likely to travel more than 5km to work than any of the comparator areas. In fact the majority (51.8%) of residents travel more than 5km to work. the equivalent figure for entire Morecambe Local Authorities (of which the CCT is part) is only 38%. This is likely to be influenced by the population of Fleetwood, Morecambe, Lancaster and Barrow more likely to have a variety of employment opportunities close at hand.

The inference is, when then considering the roles typically fulfilled by CCT residents (overleaf) that residents must travel reasonably large distances to find higher paid work.

Distance Travelled to Work	Morecambe Bay CCT	Morecambe Bay CCT %	Morecambe Bay LAs	Cumbria %	Lancashire %	England %
Less than 2km	4431	13.2	23.2	23.1	18.7	16.6
2km to less than 5km	3690	11.0	18.9	17.0	19.6	18.4
5km to less than 10km	5494	16.4	13.9	11.9	17.3	17.3
10km to less than 20km	6417	19.2	10.7	14.0	14.1	15.3
20km to less than 30km	2501	7.5	4.6	5.8	5.6	5.7
30km to less than 40km	778	2.3	3.3	2.8	3.1	2.6
40km to less than 60km	847	2.5	1.7	2.2	2.0	2.3
60km and over	1299	3.9	3.9	3.6	2.4	3.1
Work mainly at or from home	5143	15.4	11.9	12.8	9.9	10.3
Other	2896	8.6	7.9	6.7	7.2	8.5

Data: occupations

Residents of the area are more likely to be employed in managerial and professional roles than in England as a whole

The residents of the CCT are more likely to be employed in management or professional roles than in England as a whole with 30.9% of the residents employed in these roles (28.4% in England). The reverse is also true – with 9.8% of residents employed in elementary occupations compared to 11.1% in England.

It is notable that the CCT area has a greater proportion of residents employed in management or professional roles than the wider Morecambe Bay area. The urban areas tend to reduce the proportion of residents employed in the higher occupational roles.

The area attracts, it seems, a relatively high proportion of people who chose to live in the area having become more senior through their career and move into the area as they become older but continue to travel large distances to work.

Occupation	Morecambe Bay CCT	Morecambe Bay CCT %	Morecambe Bay LAs %	Cumbria %	Lancashire %	England %
1. Managers, directors and senior officials	4117	12.3	10.4	10.3	10.3	10.9
2. Professional occupations	6245	18.6	16.4	14.0	16.4	17.5
3. Associate professional and technical occupations	3568	10.7	10.4	9.7	11.1	12.8
4. Administrative and secretarial occupations	3257	9.7	10.7	9.8	11.4	11.5
5. Skilled trades occupations	5343	16.0	14.4	16.2	12.5	11.4
6. Caring, leisure and other service occupations	3407	10.2	10.8	9.7	10.7	9.3
7. Sales and customer service occupations	2189	6.5	8.6	8.6	8.4	8.4
8. Process plant and machine operatives	2093	6.2	6.9	9.4	8.2	7.2
9. Elementary occupations	3277	9.8	11.4	12.4	11.0	11.1

Data: qualifications

Within the CCT area, nearly a third of all people have achieved a degree level qualification or equivalent

As might be expected from the nature of the roles undertaken by the working CCT resident population, the numbers of people achieving at least a degree level qualification are higher than for the Morecambe Bay area as a whole or than for the national average and a smaller proportion of the population has no qualification.

In fact, the wider Morecambe Bay area has a lower level of degree qualified or equivalent people than for England as a whole.

Highest Qualification Gained	Morecambe Bay CCT	Morecambe Bay CCT %	Morecambe Bay LAs%	Cumbria %	Lancashire %	England %
No qualifications	12258	20.1	22.3	24.2	23.6	22.5
Level 1 qualifications	7157	11.7	12.4	13.6	13.0	13.3
Level 2 qualifications	9216	15.1	15.7	15.9	15.8	15.2
Apprenticeship	3114	5.1	5.1	5.4	4.5	3.6
Level 3 qualifications	7243	11.9	14.1	12.3	13.6	12.4
Level 4 qualifications and above	19773	32.4	26.3	24.6	25.0	27.4
Other qualifications	2289	3.7	4.1	4.0	4.5	5.7

Data: unemployment benefit claimants

Recorded unemployment is virtually zero in the area

Within the area, there are very few people recorded as unemployed in the area with only 350 people in total now recorded as claiming unemployment benefit. The total number has not been particularly high over the last 4 years but has been declining with the number falling by 35% over the period – a faster rate of decline than in Cumbria or Lancashire but fractionally slower than for England as a whole.

It should be noted that recorded unemployment will not measure those residents who have dropped out of the workforce but would take an employed role if one became available – or those who are 'under-employed' in roles that do not fully reflect their abilities or provide the hours that they would work if offered.

It is interesting to note that in the wider Morecambe Bay area unemployment has fallen less quickly than for all the other comparators suggesting that in the more urban settlements of the Bay there are some areas where unemployment is a longer term issue. That being said, the proportions registered unemployed across the Bay area are low.

Claimant Count	Morecambe Bay CCT	Morecambe Bay LAs	Cumbria	Lancashire	England
December 2013	535	5,670	6,365	17,820	973,930
December 2014	365	4,255	4,835	12,070	662,750
December 2015	320	4,055	4,545	12,500	582,515
December 2016	350	4,460	4,430	13,540	606,000
Percentage Change 2013-2016	-35%	-21%	-30%	-32%	-38%

Data: social classification

The social grade classifications suggest a significantly higher proportion of residents in the highest band compared to Cumbria or Lancashire as a whole.

In line with the qualifications, level of occupation and high levels of employment, a high proportion of the CCT area's residents are classified as A or B on the Acorn classification of social scale. With 26% recorded as A or B this is a higher proportion than in England and conversely with 18.4% recorded as D or E this is lower than the figure for England (24.8%) – it is also significantly lower than the figures recorded for Cumbria and Lancashire.

As would be expected given the education, occupations and claimant count levels across the Morecambe Bay area the social classification of the residents of the wider Bay area are lower – and in fact lower than the national average.

Social Classification	Morecambe Bay CCT	Morecambe Bay CCT %	Morecambe Bay LAs&%	Cumbria %	Lancashire %	England %
AB Higher and intermediate managerial/administrative/professional occupations	10852	26.0	21.0	18.8	20.5	22.9
C1 Supervisory, clerical and junior managerial/administrative/professional occupations	11836	28.4	29.2	25.6	29.8	30.3
C2 Skilled manual occupations	11298	27.1	25.8	28.4	23.6	21.9
DE Semi-skilled and unskilled manual occupations; unemployed and lowest grade occupations	7685	18.4	24.0	27.1	26.0	24.8

Data: household car availability

A relatively low proportion of the population does not have access to a car – but nevertheless these people will be somewhat isolated in the most rural settlements

The proportion of households across the CCT that have no access to a car is relatively low at 13% - in fact this is half the proportion for England as a whole. Nevertheless, one in 8 households are in this position and this is likely to create a high degree of isolation where they reside in the more rural settlements – where public transport can be extremely limited.

Transport and access to public transport is an issue for large parts of rural Morecambe Bay.

	Morecambe Bay CCT	CCT %	Cumbria %	Lancashire %	England %
All categories: Car or van availability	32,078				
No cars or vans in household	4,145	12.92	21.43	22.86	25.80
1 car or van in household	14,492	0.45	44.76	43.48	42.16
2 cars or vans in household	10,213	0.32	26.03	26.28	24.66
3 cars or vans in household	2,349	0.07	5.78	5.55	5.46
4 or more cars or vans in household	879	0.03	2.01	1.83	1.93

Data: Indices of Multiple Deprivation

For most measures (and for overall) none of the LSOAs are in the most 10% deprived in the UK – but several are in the top 10% least deprived

The Indices of Multiple Deprivation for the area rank 'living environment' as the lowest scoring – reflecting poor transport links and connectivity. In general the CCT area has low levels of deprivation relative to the rest of England.

This is not true of the Morecambe Bay area as an entirety, which whilst also showing relatively few areas of deprivation has small pockets of very high deprivation in Lancaster and Barrow-in-Furness. The lowest ranked area in the Bay is in Lancaster (ranked 80th worst in England).

Indices of Multiple Deprivation Rank out of 32,844	Overall	Income	Employment	Education	Health	Crime	Housing	Living environment
Highest Rank	31,219	31,863	31,240	32,550	28,042	32,783	32,588	27,774
Lowest Rank	8,583	6,841	6,457	5,976	4,172	14,605	824	316
Average	21,552	22,867	21,070	22,849	15,598	27,625	18,562	13,322

Area ranked highest in total basket of LSOAs in CCT area – West of Ulverston



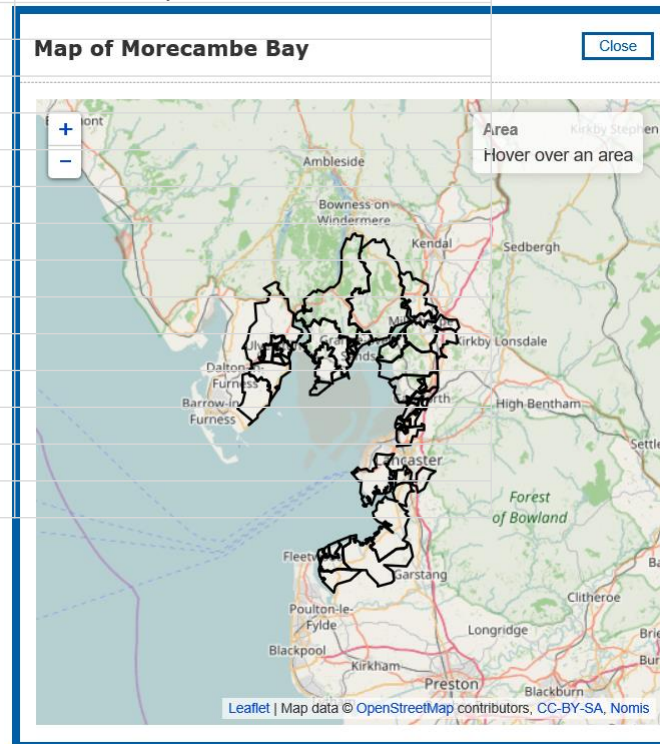
Area ranked lowest in total basket of LSOAs in CCT area – South Carnforth



Data: geographic definition

Morecambe Bay CCT Lower Level Super Output Area Definition

E01019354 : South Lakeland 013C	E01019391 : South Lakeland 014D	E01025589 : Wyre 004G
E01019349 : South Lakeland 013A	E01019380 : South Lakeland 014C	E01025588 : Wyre 004F
E01019353 : South Lakeland 013B	E01019379 : South Lakeland 014B	E01025586 : Wyre 004D
E01019355 : South Lakeland 013D	E01019378 : South Lakeland 014A	E01025587 : Wyre 004E
E01019357 : South Lakeland 013E	E01025146 : Lancaster 017F	E01025565 : Wyre 004C
E01019382 : South Lakeland 011E	E01025159 : Lancaster 003D	E01025585 : Wyre 009C
E01019347 : South Lakeland 011D	E01025160 : Lancaster 003E	
E01019343 : South Lakeland 011C	E01025158 : Lancaster 003C	
E01019342 : South Lakeland 011B	E01025089 : Lancaster 003A	
E01019341 : South Lakeland 011A	E01025090 : Lancaster 003B	
E01019377 : South Lakeland 010C	E01025097 : Lancaster 001C	
E01019381 : South Lakeland 007B	E01025098 : Lancaster 001D	
E01019386 : South Lakeland 007C	E01025169 : Lancaster 001G	
E01019351 : South Lakeland 008D	E01025168 : Lancaster 001F	
E01019390 : South Lakeland 012C	E01025148 : Lancaster 001E	
E01019392 : South Lakeland 012D	E01025096 : Lancaster 001B	
E01019389 : South Lakeland 012B	E01025088 : Lancaster 001A	
E01019388 : South Lakeland 012A	E01025107 : Lancaster 019C	
E01019393 : South Lakeland 014E	E01033072 : Lancaster 016I	



Data sources: 2011 census, ONS Indices of Multiple Deprivation, Business Register and Employment Survey



MORECAMBE BAY

Coastal Community Team

**Draft Economic Plan
May 2017**