

SQW

BLUE SAIL ▶

LANCASTER CULTURAL HERITAGE STRATEGY

REPORT FOR LANCASTER CITY COUNCIL



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EXECUTIVE SUMMARY

Lancaster is widely recognised as a city with exceptional cultural heritage. Its long history is written large in its streets and buildings. Once a Roman fort, Lancaster was an important medieval town with a Castle and Priory. In the Georgian era the success of the port and later the canal generated wealth to create the splendid public buildings, dwellings and warehouses that give the city a special character. The nineteenth and twentieth centuries have added their own remarkable buildings, the Town Hall, the Ashton Memorial and the Cathedral among them.

While **Morecambe** derives much of its fame from its spectacular position on the Bay, it has its own heritage character. At first a fishing village it developed as a popular seaside resort in the nineteenth and twentieth centuries. Tall lodging houses still line the promenade and attractive streets of substantial stone terraced houses remain. The Winter Gardens is the surviving music hall theatre from that era of mass tourism while the Midland Hotel, now marvellously restored, is a reminder of a more glamorous age.

Nearby, the old village of **Heysham** shows its ancient roots in the remains of St Patrick's Chapel, the rock-hewn graves on Heysham Head and the Saxon, Norman and Gothic elements of St. Peter's Church. The outstanding countryside at **Silverdale and Arnside** is primarily noted for landscape but also has many traditional heritage features such as vernacular buildings, parkland and dry stone walling. The **Forest of Bowland** falls partly in Lancaster District and its estate villages, parks and houses enrich the quality and value of the distinctive landscape. **Carnforth**, once an important railway and industrial centre, has a claim to fame from a different era; its station was used for the filming of the 1945 romantic classic 'Brief Encounter'.

The aim of this Strategy is to identify **how Lancaster can make the most of this exceptional heritage** for the benefit of local people, visitors and the economy. In particular it looks at and evaluates a number of options for investment in the heritage over the next 10 years.

A particular focus of the Strategy is the city of Lancaster, its built heritage, the stories behind it and the way it is interpreted, marketed and managed. Research suggests that the greatest economic value of the heritage derives from the attractiveness of townscapes. Those that have retained a large number of historic buildings are substantially more popular places to spend leisure time and as places to live, to work and to study. However in Lancaster improvements need

to be made to the public realm and its maintenance to make the most of its special character.

As a heritage destination Lancaster has a low profile. For most people it is not on the radar as a choice for a visit or a break. While the Castle is seen as a potential centrepiece of Lancaster its operation as an attraction is severely constrained at present. There is criticism of the range and quality of other visitor attractions in Lancaster that have had little recent investment and seem not to be a central part of city life. Lancaster should aim for the Castle to become a must see-attraction and connect it strongly with improved heritage attractions in the city.

A key challenge for Lancaster is to **offer the 'rounded' experience** to be found in the most successful heritage cities. They combine strong heritage attractions that are both fun and educational with plenty of other things to do and see, including distinctive retail and eating offers and attractive hotel accommodation in historic settings, well-cared for public realm that is easy to find one's way around on foot and in many cases an attractive, busy waterfront. Lancaster should aim to develop and enhance the amenities and experiences that visitors and locals expect to find in a modern heritage city.

The Strategy calls for a re-think in **the way Lancaster is marketed**. Lancaster and Morecambe appeal to very different markets and the promotion of the city of Lancaster needs to be focussed on its outstanding character as a modern heritage and university city. There should be fuller partnership working and sharing of brand guidelines between organisations that promote Lancaster, including the universities and Lancashire and Blackpool Tourist Board. The emphasis should be on online promotion and the full use of customer and product data.

The Strategy examines the **management** of the heritage. It sees the Local Strategic Partnership having a key role in coordinating and prioritising support for the cultural heritage while the City Council has responsibilities for securing implementation of action and supporting the voluntary sector where it helps to care for the heritage. A Business Improvement District could be a significant mechanism for greater cooperation and investment in the heritage. The Strategy considers options for museums management, arguing that a single museums service for Lancaster makes operational sense, provided an acceptable financial arrangement and SLA can be agreed by the City Council, whether with the County Council or with a potential Heritage Trust.

The first priorities for capital investment in the cultural heritage are identified as follows:

- ▶ Improvements to the public realm in the city, building on the recent 'Square Routes' proposals
- ▶ Extension of the visitor experience at Lancaster Castle, on relocation of the courts service
- ▶ Morecambe Townscape Heritage Initiative 2: A View for Eric which with grant assistance from the Heritage Lottery Fund will support renovation of the Victorian and Art Deco buildings around the western end of the Marine Road Central area complemented by quality improvement to streetscapes.
- ▶ Lancaster City Museum: extension and re-modelling to provide better exhibition spaces and visitor facilities, capitalising on its town centre positioning
- ▶ Morecambe Bay Landscape Partnership scheme, currently being designed, to involve local people in the conservation and presentation of heritage features in the landscape.

The redevelopment of the Castle to include a major attraction would also be a first priority, and potentially a transformational project, but is dependent on decisions of the Courts Service and the Duchy of Lancaster.

Other schemes with a major potential impact, include

- ▶ Redevelopment of the Canal Corridor in the city
- ▶ Development of further boutique city centre accommodation
- ▶ Renewal of Victorian and Edwardian housing in Morecambe
- ▶ Further enhancement of the promenade in Morecambe.

The **highest priority revenue options** are

- ▶ Maintenance of the public realm in the historic centre of Lancaster
- ▶ Better, coordinated marketing of Lancaster

- ▶ Facilitation of a Business Improvement District initiative
- ▶ Support for growth of a programme of festivals and events
- ▶ A feasibility study (when the options for future uses of the Castle are clearer) of the potential to rationalise the museums service and its buildings.

The actions and investment recommended in the Strategy stand together as a package. It is important that investment in the fabric of the place is accompanied by actions to develop the all-round offer of things to do and see, and is supported by coordinated and well-targeted marketing.

1 INTRODUCTION

ABOUT THE CULTURAL HERITAGE STRATEGY

101. The City of Lancaster has commissioned Blue Sail in association with SQW Consulting to develop a Cultural Heritage Strategy for the district. The purpose is to create a 10 year Cultural Heritage Investment Strategy. This is to be accompanied by an assessment of the economic impact that can be achieved through investment in the heritage.

102. Heritage can mean different things to different people and it is important to define the boundaries and priorities for the study. The brief for this Cultural Heritage Strategy suggests a wide definition of cultural heritage. It begins with historic buildings and refers also to landscapes, art and artefacts, sculpture and monuments, oral history, museums, libraries and archives. This definition does not include the performing arts¹ or the natural heritage, important though those things are to the quality of life and the experience of visitors.

103. In the event the main focus of the Strategy is on the city of Lancaster, its built heritage, the stories behind it and the way it is interpreted, especially through the museums and other visitor attractions. The main reason is that the architecture and streetscapes of Lancaster are the outstanding cultural heritage assets, setting Lancaster apart from other cities in the North West. Consultees gave these features the greatest attention and saw them as the main potential areas for investment. They did not identify areas such as libraries and archives, oral history or (rural) landscapes for investment. This is not to say that other parts of the district lack heritage; but the outstanding features of Morecambe, for example, and the rural areas relate to the natural environment. Nonetheless their built and cultural heritage investment needs are considered.

104. While the main focus of this Strategy is the economic benefit of heritage, our view is that the **value of heritage** is not simply related to tourist attractions or recorded by the number of people that work in the sector. It is important to remember the wider social role that heritage plays. Heritage gives a place its character; it is at the heart of a place and is at least as important for residents as it is for visitors, investors and students. English Heritage argues that people care deeply about their local heritage and that it has the potential to strengthen the sense of community and provide a solid basis for neighbourhood renewal:

¹ An Arts Strategy for Lancaster has been drafted separately.

*The historic environment is a vital part of place- making. It provides character, distinctiveness and a sense of place. It helps local people be proud of where they live. Over 90% of adults living in England think that when improving local places it is worth saving their historic features...*²

HOW THE STRATEGY WAS DEVELOPED

105. The process to develop this Strategy was overseen by a Steering Group of officers from Lancaster City Council, Lancashire County Council, the Lancashire and Blackpool Tourist Board (LBTB) and North West Development Agency (NWDA), to whom the consultants reported.³ The stages were:

Scoping, Review and Audit

- ▶ Familiarisation visits to the district
- ▶ Scoping interviews and visits to key bodies and heritage and tourism agencies, to understand the scale and nature of the challenge and opportunities
- ▶ A comprehensive literature review, including relevant local, sub-regional and regional research and policy statements.
- ▶ Analysis of secondary data and survey evidence
- ▶ Review of two significant visioning exercises undertaken in 2005-06, discussed in section 4 below.
- ▶ Audit of components of the heritage – attractions and character areas
- ▶ Review of the way Lancaster and district is promoted, in discussion with marketing officers of the relevant organisations
- ▶ Analysis of postcode data to generate profiles of existing visitor segments⁴

Economic Impact Model

- ▶ Development of a model by which to assess the economic benefit of investment options

² *Valuing our Heritage: the case for future investment in the historic environment*, English Heritage 2007. <http://www.english-heritage.org.uk/publications/valuing-our-heritage/valuing-our-heritage.pdf/>

³ Names of the Steering Group are given in Appendix 1

⁴ Postcodes of visitors to Lancaster and Morecambe were separately analysed using the Mosaic Segmentation system; see Chapter 9, below, on the Marketing of Lancaster's Cultural Heritage.

Consultation

- ▶ Initial analysis and formulation of ideas and potential actions
- ▶ Consultation by depth interviews, face to face and telephone with local and sub-regional and regional stakeholders and delivery partners
- ▶ Two Think Tanks – the first focussed on the ‘product’, the second on promotion and marketing, for invited participants to test concepts and generate alternative ideas
- ▶ A follow-up Marketing Workshop attended by LBTB, Lancaster City Council and Cumbria Tourism (Morecambe Bay interest) officers focussed on segmentation research, target markets, branding and opportunities for partnership working.

Report

- ▶ Analysis of evidence and consultation
- ▶ Consideration of economic impact of investment options
- ▶ Preparation and presentations of draft and final reports and action plan

106. The process took place primarily between March and September 2010. During that time there was a change of Government leading to decisions to abolish the regional development agencies and regional strategies, accompanied by severe curtailment of public spending. It is not yet clear in detail how this will affect investment in heritage or in the development of tourism; but together with constrained private sector investment it is likely to create a challenging environment for delivery of investment options set out in this Strategy.

2 THE CONTEXT

HISTORICAL CONTEXT

201. This brief historical account is to explain how the character of Lancaster district developed and to provide insight into the significance of its heritage.

Lancaster

202. Lancaster's long history is written large on its streets. Each age has left its marks on the city, but generally without wiping away the influence of what went before. So there is a deep patina of heritage about the city which creates a special character.

203. The Roman era has given the city its name⁵, the remains of a bathhouse⁶ and the site of a massive stone fort dating from around 340AD. The line of the Roman road into Lancaster and the main road of the civil settlement are preserved in the current Penny Street/Cheapside and Church Streets. Within the site, after the Roman era, was built the dominating feature of the city – the Castle. Begun around the late 11th century and extended several times including in the Georgian period, the Castle reflects Lancaster's key role as a place of justice and punishment. The Castle was until very recently the oldest working prison in England and the courts have witnessed famous and infamous trials, including those of the Pendle witches in 1612. As a Palatinate Lancaster had its own assize jurisdiction until 1876 and the Duchy of Lancaster retains a separate identity within the Crown's possessions.

204. Close to the Castle and also within the site of the Roman fort is the Priory Church. Christian worship was taking place on Castle Hill as early as the 2nd century⁷ while a church is believed to have been on this site from the 7th century. In 1094 the Priory Church was founded and endowed under the control of a

⁵ *Lun castrum* – the fort on the Lune

⁶ The bathhouse remains were excavated in 1973-74 and is conserved on Vicarage fields near the Castle; there are believed to be other unexcavated Roman features in that area.

⁷ The discovery of a Roman lamp with Christian symbols (the Chi-Rho design) in the area proves that explicit Christian worship was taking place on Castle Hill as early as the 2nd Century of the Christian era. This lamp is currently housed in the City Museum, though there is no attempt made in its display case to explain the significance of this small piece of terracotta.

Norman Abbey. When the Priory was suppressed by Henry V in 1424 it became the Parish Church of Lancaster. The flamboyant decorated choir-stalls (including many well-preserved misericords) date from 1345 and are regarded as among the finest in the country.

205. The Tudor and Stuart period have left relatively little trace but the religious difficulties of those eras did not pass Lancaster by, with a number of priests and others being tried at the castle and then executed in what is now Williamson Park. Some fighting occurred here in the Civil War, with the castle being the main concern for both sides; during one engagement in March 1643 much of the southern part of the town was burnt and the remainder plundered. Parliament ordered the external walls of the castle to be blown up in 1649, and the 'young pretender' marched through the town in August 1651, being declared King of England in the Marketplace. In 1698 a destructive fire swept the town which may have led the travel writer Celia Fiennes to say '*Lancaster is old and much decayed*' while a few years later Daniel Defoe declared there is '*little to recommend it but a decayed castle and more decayed port*'.

206. But that soon changed as Lancaster became a busy and profitable port in the 18th century. Traders from Lancaster exported manufactures and textiles, and imported sugar, rum and cotton from the West Indies and North America. They profited also from the slave trade, transporting over 29,000 African slaves between 1736 and 1807. Sunderland Point at the mouth of the Lune was developed as a port early in the eighteenth century and still has buildings from that era on its quay. However the navigation of the River Lune was improved and between 1750 and 1755 St George's Quay in Lancaster was developed to cater for the growing number of ships. Among the new buildings was a Custom House, which now houses the Maritime Museum.

207. The effects of this international trade were far-reaching, bringing new wealth, industry and development to the town. Lancaster had a substantial ship-building and repairing business while the Gillows firm became leading makers of fashionable furniture. The Lancaster canal was begun in 1792 with the impressive Lune aqueduct taking it northwards towards Kendal in 1797. A new dock was developed at Glasson, nearer the mouth of the Lune, in the late eighteenth and early nineteenth century with a small settlement growing up around it. The prosperity of the era is very visible today in the new houses, shops and public buildings in Lancaster such as the Assembly Rooms, the Old Town Hall and St. John the Evangelist Church. Most of the buildings of the period were constructed in sandstone quarried from Lancaster Moor (later the site of Williamson Park). Collectively these buildings give the centre of Lancaster its consistent Georgian architectural character.

208. Lancaster was eclipsed as a port by Liverpool early in the nineteenth century and the city's relative decline no doubt helped to preserve its character. The cotton industry and engineering changed many Lancashire towns but the industry that developed in Lancaster did not impact directly on the city centre. The manufacturing specialism in linoleum and oilcloth nonetheless generated wealth with which leading industrialists created several landmark buildings – the Ashton Memorial in Williamson Park, the Storey Institute and the Town Hall. The fine Catholic cathedral and the railway station, both built in a neo-Gothic style in the mid-nineteenth century, are of a scale and character that fit with the older fabric. Thus Lancaster retains a compact and unspoilt historic core. Immediately around it, contained within the conservation areas of the city, is pleasant, mostly terraced housing from the Victorian and Edwardian era.

Morecambe

209. Morecambe developed strongly in that same Victorian period and through to the middle of the twentieth century. Though scarcely three miles from Lancaster its appearance was formed by a different history, first as a fishing village and then as a popular seaside resort. Its fortune was underpinned by the railways that brought holiday makers from the industrial cities of the North and Scotland. Tall lodging houses still line the promenade and attractive streets of substantial stone terraced houses remain. The Winter Gardens is the surviving music hall theatre from that era of mass tourism. The railway originally led to the stone-jetty from where it connected with steamers bound for Ireland and elsewhere, while the original Midland Hotel provided accommodation for travellers awaiting the turn of the tide. The Midland was replaced by the present Art deco hotel which, after a period of seemingly fatal decline, has been marvellously restored and re-opened. But the predominant character of Morecambe remains Victorian and Edwardian. The history and character of Morecambe is similar, it must be said, to that of a number of other northern seaside resorts.

210. The exception is the old village of **Heysham** immediately nearby. Its ancient roots are readily apparent. The remains of St Patrick's Chapel and rock-hewn graves on Heysham Head are remnants of an early Christian era while St. Peter's Church contains Saxon, Norman and Gothic elements.

Areas of Outstanding Natural Beauty

211. Morecambe enjoys a spectacular position on the Bay, renowned for its bird life and for views of the Lake District mountains. It is close to outstanding countryside at **Silverdale and Arnside** whose landscape has been shaped by human activities over many centuries and retains many heritage features such as

vernacular buildings, parkland, dry stone walling and industrial remains. One of Lancaster's famous families, the Gillows, had their home at Leighton Hall.

212. Part of the **Forest of Bowland** lies within Lancaster District. Its apparently natural landscape is in fact the result of many centuries of human intervention such as for grazing sheep and cattle, and management for game shooting. Estate villages, parks and houses enrich the quality and value of the distinctive landscape. Remains of motte and bailey castles can be found in the Lune Valley and the ruins of a Cistercian abbey are preserved at Sawley.

Carnforth

213. **Carnforth**, once an important railway and industrial centre, has several significant railway structures including perhaps the last intact locomotive coaling tower in the country, and a collection of heritage rolling stock. The imminent designation of a Conservation Area should provide an opportunity to address the repair, conservation and in some cases the reuse, of the significant railway heritage buildings. The Station's current claim to fame comes from its use for the filming of the 1945 romantic classic 'Brief Encounter'. Its buildings have been restored by a voluntary trust and the waiting and refreshment rooms are regularly open to the public.

THE STRATEGIC CONTEXT

214. This section provides an overview of the strategic aims of national, regional and local policies for the management and presentation of the cultural heritage. From this it identifies the current strategic aims and development objectives for Lancaster and Morecambe with relevance to the future of the cultural heritage.

The National Context

215. According to English Heritage 'one of the most significant changes in society in the last 25 years has been a vast increase in the number of people who care deeply about the historic environment. Most people now see the historic environment as reinforcing their sense of place, belonging and well-being; and putting quality, variety and meaning into their lives.'⁸

⁸ *English Heritage Strategy 2005 – 2010: Making the Past Part of Our Future*, English Heritage, 2005, available at <http://www.english-heritage.org.uk/publications/eh-strategy-2005-2010>

216. The historic environment and heritage is vitally important to the UK's tourism industry, recognised as one of the key attractors of visitors internally and abroad. The **British Tourism Framework Review** argues that 'visitors cite Britain's culture and heritage-related assets and activities (including the country's many free museums) as key reasons for coming here and that consequently those heritage assets should be curated, protected and presented as well as they can be'⁹.

217. The **Strategic Framework for Tourism in England**¹⁰ identifies a potential 5% per annum growth figure for the sector and has proposed a collaborative England marketing plan which in part will be based on well-known themes, such as walking, heritage and sport, to attract visitors and encourage them to travel and spend more widely in the country.

218. The Government's recent Planning Policy Statement 5, **Planning for the Historic Environment**¹¹, sets out a policy aim that the historic environment and its heritage assets should be conserved and enjoyed for the quality of life they bring to this and future generations. Associated planning objectives are to deliver sustainable development that recognises that heritage assets are a non-renewable resource, take account of the wider social, cultural, economic and environmental benefits of heritage conservation and recognise that intelligently managed change may sometimes be necessary if heritage assets are to be maintained for the long term. It requires planning policies to protect heritage through decisions based on the nature, extent and significance of the assets and wherever possible heritage assets are to be put to an appropriate and viable use consistent with their conservation.

⁹ *Achieving the Full Potential of the Visitor Economy* – British Tourism Framework Review, 2009, available at http://www2.visitbritain.com/en/Images/VB_Ex%20Summary_aw%20final_tcm12-151959.pdf

¹⁰ *Strategic Framework for Tourism in England*, Visit England 2010

¹¹ <http://www.communities.gov.uk/documents/planningandbuilding/pdf/1514132.pdf>

The Regional Context

219. Since the election of the Coalition Government in May 2010 there is no current regional strategy. However, earlier strategies still provide an insight into agreed regional priorities. The **North West Regional Economic Strategy**¹², adopted in 2006 after wide consultation, saw the development of vibrant and attractive cities and rural areas, capitalising on the North West's rich culture, heritage, sport and university assets as a route to establish international competitive advantage and distinctiveness. It identified a stronger cultural offer based on the Northwest's outstanding historic environment, arts and museums and strong industrial heritage as an objective. Lancaster was one of three cities identified as 'heritage cities.'

220. **The North West Regional Tourism Strategy**¹³ argues for focus on offering some of the best visitor destinations in the UK and underlines the importance of local authorities in place-shaping. Culture and heritage are identified as core elements of the visitor economy.

221. Recent research on **Heritage Tourism in England's Northwest**¹⁴ found there are a limited number of 'top heritage' brands that draw people just for heritage. High awareness UK heritage days out include Bath, the Cotswolds, Warwick and Edinburgh Castles, York Minster and Beamish Museum. Lancaster is currently not on the radar but the Pendle witches have some recognition as a heritage theme.

222. The NW research also identified that strong heritage city brands and well-known attractions lead the decision-making process for days out and breaks. Families in particular look for heritage experiences that offer fun and interactivity. Stories, legends and personalities do not motivate visits unless there is something worthwhile to see. However, research also identified that successful brands and attractions must meet essential visitor needs including good food, accommodation and transport in order to offer 'a whole day out'.

¹² *North West Regional Economic Strategy, 2006*, available at <http://www.nwda.co.uk/publications/strategy/regional-economic-strategy-200.aspx>

¹³ *North West Regional Tourism Strategy 2003-10, 2007* (original 2003), available at <http://www.nwda.co.uk/PDF/tourism%20strategy0307.pdf>

¹⁴ *Heritage Tourism in England's Northwest*, report by Blue Sail and Bluegrass Research for NWDA, English Heritage and the National Trust, 2010.

Lancashire context

223. With the closure of the RDAs there will be less emphasis on regional and sub-regional approaches and more focus on functional geographic entities reflected by local enterprise partnerships. However the **Lancashire Economic Strategy**¹⁵ is very much focused on 'moving Lancashire up the value chain' by improving economic competitiveness and performance through increased growth in high value added sectors. The strategy considers Lancaster's high quality historic environment as valuable for attracting and retaining a highly skilled workforce. According to a survey, many graduates considered Lancaster a backwater before coming to study and discovering a lively social scene on offer. This points to issues about external image and a need for positive profiling.

224. The **Visitor Economy Strategy for Lancashire**¹⁶ identifies Lancaster as one of the destinations with greatest opportunity, calling for investment in the heritage product and public realm to deliver a historic city with appeal to higher-value visitors. It calls for Lancashire and Blackpool Tourist Board's branding and destination marketing to be market-led, evidence based and customer focused, based on excellent Customer Relationship Management¹⁷(CRM). One of its themes is Heritage Revealed and it cites Lancaster's historic city, along with the story of the Pendle Witches and canals and waterways as among the strongest experiences within that theme. It calls also for a 'polishing gems' programme to improve the setting, the facilities and the marketing of museums and heritage sites.

Local strategic context

225. The Lancashire District Strategic Partnership's **Community Strategy**¹⁸ is the overarching strategy document for the local area. It states that protecting and

¹⁵ *Lancashire Economic Strategy*, 2006. Lancashire Economic Partnership

¹⁶ *Lancashire and Blackpool Visitor Economy Strategy 2006-16*, Lancashire and Blackpool Tourist Board <http://www.lancashireandblackpool.com/site/about-us/strategy/visitor-economy-strategy>

¹⁷ Customer Relationship Management is a strategy for managing interactions and marketing to customers or visitors, especially using technology to store and use information about customers and their behaviours and preferences

¹⁸ 'Sustainable Community Strategy', 2008, Lancashire District Strategic Partnership ,available at http://www.lancaster.gov.uk/Documents/Corporate%20Strategy/LDLSP/LDSLSP_SCS_2008_FOR%20SCRE EN%20VIEWING.pdf

enhancing the environment is of value for its own sake and because a damaged environment will sooner or later affect people's quality of life. Under its economy theme, priorities are

- ▶ To place- shape Lancaster City and riverside as a regionally significant visitor and shopping destination and a competitive employment destination with an outstanding waterfront.
- ▶ To regenerate and re-invent Morecambe as an attractive choice to live, work and visit.

The development of this Cultural Heritage Strategy is an action to show how these objectives can be carried forward.

226. The City Council's **Corporate Strategy** (2010) states two priorities in regeneration

- ▶ the energy coast/environmental technology development (which requires good places to live)
- ▶ heritage and cultural tourism including creative industries

It suggests development of a planned programme to enhance the heritage offer, including improvements to museums, the retail offer and the Castle. The Square Routes public realm project and the Morecambe Area Action Plan are seen as working towards those ends.

227. The **Lancaster Tourism Strategy** (2006-2010:2008 update)¹⁹ shows eagerness to capitalise on this 'heritage city' brand for Lancaster:

For tourists, Lancaster will be recognised as a historic city focussing on its built heritage, attracting higher spend visitors interested in history, culture and education. Lancaster will be seen as one of the major historic cities of the region. More accommodation will be provided to accommodate growing visitor numbers linked to cultural events, expanding nightlife, business tourism and students/visitors to the higher education establishments. Lancaster will have growing numbers of overseas visitors supplementing the domestic market for heritage and culture. The cultural history of Lancaster will be the main growth area for visitors to the district and to north Lancashire

The **vision for Morecambe** is somewhat different:

¹⁹ *Lancaster Tourism Strategy 2006-2010: 2008 Update* Lancaster City Council, 2008.

Morecambe will be a vibrant resort providing facilities needed in the 21st century... With young families, over 50's and special interest holidays forming the majority of visitors, the attractions and infrastructure will be suited to their tastes and needs.... Morecambe will be recognised for the quality of its environment, its infrastructure including public art, its accommodation and its proximity to the historic city of Lancaster, the national parks and AONBs.

228. The Lancaster **Core Strategy**²⁰, adopted in 2008 is part of the Local Development Framework. It envisages design and heritage-led regeneration of central Lancaster focusing on its role as a major shopping centre (see Policy ER4), a historic City with major tourism potential (see Policy ER6) and an important cultural centre. It sets objectives of creating a high quality historic environment in the City Centre, developing the potential of the Castle and Town Hall and through regeneration and new development creating environments of a quality that enhance the City. A better tourism offer, including more city centre hotels, will enhance the vitality and viability of the City Centre.

229. The Core Strategy outlines the regeneration of central Morecambe enabling it to remain an important visitor destination with a modern visitor offer based on its outstanding Promenade, its built heritage, its natural surroundings and its iconic seafront buildings, particularly the Midland Hotel (now restored) and the Winter Gardens (not yet restored). The policy also refers to continuing the regeneration of Carnforth's railway, canal and industrial heritage.

230. Work and consultation on the **Morecambe Area Action Plan** is under way. It will provide a framework to manage development and change within central Morecambe and will identify key infrastructure projects. This Cultural Heritage Strategy will consider a number of potential heritage related projects in Morecambe but their priority and relevance must ultimately be determined through the Area Action Plan process.

231. Both the AONBs partly within the Lancaster District, Arnsdale and Silverdale and The Forest of Bowland have their own Management Plans.²¹ These plans

²⁰ Core Strategy (2003-2021) Lancaster City Council; adopted 2008.

²¹ Arnsdale and Silverdale Statutory Management Plan 2009, <http://www.arnsidesilverdaleaonb.org.uk/images/stories/pdfs/managementplan09.pdf>. Forest of Bowland Management Plan April 2009- March2014

contain detailed policies to protect the character of the landscapes and historic built environment and archaeology. They aim to increase awareness of the heritage assets, the need for appropriate management and to promote sustainable tourism within the areas.

http://www.forestofbowland.com/files/uploads/pdfs/Bowland_Management_Plan_LoRes.pdf

ECONOMIC CONTEXT

232. The district of Lancaster, which includes Morecambe, has a population of 143,700 (2008) with 90,800 people of working age. Seventy-nine per cent of those of working age are economically active, exactly in line with the national average and slightly above the regional average. This figure has dropped by one percentage point since 2008.

- ▶ **The gross average weekly wage is above the regional average (£482.60 compared to £460.20)** and slightly below the British average of £491. Employers in the area have a skilled workforce available - 30% of the authority's residents are qualified to NVQ Level or above compared to 29% nationally and 26% regionally.
- ▶ **The public sector is a major employer in the area with over 35% of the workforce** compared to 28% regionally and 26% nationally. This is a concern given the recent and continuing public sector spending cuts and subsequent wage freeze.
- ▶ **Particularly relevant for this study, 10% of all jobs in the district are in visitor economy**, slightly above average (8.2% at a regional and national level). The figure is not sufficiently high to suggest that the area has any sort of economic dependency on tourism, but it is a significant part of the economy.
- ▶ **Despite a well skilled and educated workforce the district has quite low levels of entrepreneurship.** There were just 270 VAT registrations in 2007 which equated to 7.3% of business stock compared to 10.6% regionally and 10.2% nationally. This might be expected to be higher considering the presence of Lancaster University.

Visitor economy baseline

233. Tourism is an important sector of the economy. Lancaster City Council values tourism to the district at approximately £270m; it supports around 5,000 jobs. The 2008 STEAM²² and destination benchmarking reports for Lancaster and

²² STEAM (Scarborough Tourism Economic Activity Monitor) is a widely used mathematical model of tourism volume and value derived from input of data relating to bedstock and occupancy, attendances at significant attractions and events, TIC visitor figures, the annual UK day visitor survey, the International Passenger Survey, benchmarking surveys, research on daily spend by visitors and other sources. The confidence level of the model is calculated to be within the ranges of plus or minus 10% in respect of the yearly outputs and plus or minus 5% in respect of trend.

Morecambe estimate that although tourist numbers increased by 4% between 2007 and 2008 (from 4,620,000, to 4,786,000) visitor expenditure dropped by 3% (from 277.8 million to 269.6 million), showing a reduction in spend per head. Given that 2008 was the start of the recession this fall is not unexpected and the change in expenditure reported is likely to be well within the margin for error in the analysis.

234. The STEAM data also provides data on the numbers of staying and day trip visitors which are used to inform the modelling of economic impact.

Table: Types and number of visits

	Lancaster City and rest of Lancaster	Morecambe
Staying visitor days	1.5 million	1.3 million
Staying visitors	0.4 million	0.4 million
Day trip visitors	1.8 million	2.2 million

Source: STEAM 2008

Average expenditure is also required for the model and is taken from the STEAM figures for day and staying visitor expenditure for Morecambe and Lancaster.

Table: Visitor Expenditure

	Lancaster City and rest of Lancaster	Morecambe
Staying visitor expenditure	£195	£208
Day visitor average expenditure	£27	£27

Source: STEAM 2008

The destination benchmarking reports provide estimates of visitor origin and show that Lancaster city has a significant number of overseas visitors.

Table: Visitor origin

	Lancaster	Morecambe
Within Lancashire	25%	25%
Rest of North West	19%	25%
Rest of UK	40%	49%
Overseas	16%	2%

Source: Lancaster and Morecambe destination benchmarking reports 2008

235. Other findings from the STEAM data are:

- ▶ 70% of those surveyed were repeat visitors. The majority of tourists to the area come for leisure or holidays, (some 88% in Morecambe's case).
- ▶ Additionally, 14% of visitors to Lancaster are there to shop – highlighting the importance of the retail offer to the visitor economy in the city.
- ▶ A noticeable difference between the visitors to Lancaster and Morecambe is the accommodation type used; **in Morecambe more than 70% were staying in a hotel whilst for Lancaster this figure was just 38% with 52% staying at the home of a relative or friend.**
- ▶ **Within Lancaster the castle was the most visited destination by far amongst those surveyed (42%)** followed by shops (17%) and the Priory (16.5%). Only 4% had visited the maritime museum – this is a low percentage for an attraction.

CONCLUSION

236. In conclusion, national strategic thinking fully supports the value of heritage for its contribution both to the quality of life and to the economy. Regionally and locally, the special quality of the cultural heritage of the city of Lancaster is consistently recognised as a basis for investment and promotion, with the growth of tourism an objective. The emphasis for Morecambe is weighted rather more to modernising its resort status with emphasis on the value of its natural environment, with the built heritage nonetheless playing a supporting role.

237. A point of concern is that the balance between the value of heritage as a generator of tourism and its value as the backdrop for other economic activity needs to be struck realistically. The volume of discretionary tourism to Lancaster

(i.e. discounting business, family and routine trips) is quite modest and the visitor attractions are relatively small. Lancaster is not on the radar of most people as a destination. Unless Lancaster develops a 'must-see' attraction any increases in leisure tourism volumes are likely to be incremental. Research suggests that the greatest economic value of the heritage derives from the attractiveness of townscapes rather than individual 'heritage attractions'; townscapes that have retained a large number of historic buildings are substantially more popular places to spend leisure time and are likely to be more popular also as places to live, to work and to study²³.

²³ *The Economic Impact of Heritage in the North West*, Amion, Locum Consulting and Taylor Young for NWDA

3 RECENT VISIONING OF LANCASTER'S CULTURAL HERITAGE

301. Two recent documents have set out a vision for Lancaster, each in its way describing the importance of the cultural heritage. The first was *Historic Towns and Cities in England's Northwest*²⁴ produced for NWDA in 2005. This was an overview of the way heritage could contribute to economic development together with 'top level' analysis of five towns and cities, one of which was Lancaster. The second was the *Lancaster and Morecambe Vision*²⁵ report of 2006 which set out an economic vision for the whole district.

302. Both documents contain a list of suggested actions and developments to help realise the vision. They did not evaluate the impact or feasibility of those actions in any detail. Nor did they dwell on the management or resource implications. Rather they state some principles and advocate a broad direction to be picked up for further study. In the case of the Lancaster and Morecambe Vision (LM Vision) the task of taking things forward has fallen to the Lancaster District Strategic Partnership through its Community Strategy.

303. The Historic Towns and Cities report aims *to identify a small number of towns and cities as strategic priorities for long-term heritage related tourism infrastructure and product development where these can stimulate economic growth and deliver wider regeneration benefits*. It begins with an overview of 15 places of historic interest in the North West and draws some general conclusions, which have relevance to Lancaster:

- ▶ Heritage assets can be used as a backdrop to development and activities of contemporary relevance and appeal, rather than just as heritage attractions.
- ▶ Too much faith can be placed in tourism as a generator of regeneration and economic growth – usually there is more economic benefit in persuading local

²⁴ *Historic Towns and Cities in England's Northwest*, Edaw and Locum Consulting for NWDA 2005

²⁵ *Lancaster and Morecambe Vision 2006*, the Lancaster and Morecambe Vision Board.

people and those who live nearby to spend their money in the town or city centre

- ▶ Caution is advised in planning new heritage attractions as they can be difficult to sustain. In many instances they have not achieved the projected visitor numbers required to ensure their commercial viability and in the longer term can have higher operating costs than originally envisaged.
- ▶ The report suggests identifying quarters of distinctive character within a town or city, enhancing their distinctiveness and focussing on contemporary uses for heritage buildings
- ▶ The report highlights the difficulty that many towns and cities have experienced in attracting hotel investment. It identifies the need to improve the viability of development through the planning process to encourage more investment.

The report's overview of Lancaster is that it could be promoted as a '**Georgian Gem**' and aspire to be the '**Bath of the North**'.

304. The Lancaster and Morecambe Vision (LM Vision) describes a vision of the district functioning as a single coherent whole, being a place that is highly desirable for living and working, and better known for and proud of its distinctive 'world-class assets'. Those assets are

- ▶ The historical and attractive city centre of Lancaster, at its pinnacle a major tourist attraction, the castle
- ▶ The magnificent seafront, views and leisure opportunities of Morecambe and Heysham
- ▶ The contrasting rural landscape
- ▶ The educational and research prowess of its two universities

305. There is much common ground in the views of the heritage expressed by the two documents. Both take the cultural heritage of Lancaster to be a great asset, but one that is insufficiently known and appreciated. Both studies see heritage as a component of a desirable place to live and work but that improvements need to be made to the infrastructure and public realm. These views were substantially supported by our consultees. The studies advocate redevelopment of the canal corridor and the Luneside east area, and the development of more hotel accommodation in the city centre. Once again that is in line with consultees' views.

306. Both reports see the Castle as, potentially, the transformational project for Lancaster's position as a visitor destination. The Historic Towns and Cities report advocates working within existing constraints for the moment, but seeking the removal of the courts and ultimately an accessible use of the whole Castle. It is rather more cautious, however, about the sustainability of a visitor attraction use of the whole site than is the LM Vision; the latter refers to a world class heritage site with museum displays of royal art and jewels, a prison tour and museum of law and punishment, and a venue for performance of plays and music. In our view a **mixed use future development of the Castle** is likely to be more achievable and more sustainable.

307. Neither report has much to say about what should happen to the Ashton Memorial and Williamson Park, referred to as a hidden local secret that could be better promoted. The LM Vision is critical of the range and quality of the museum attractions in Lancaster, particularly that many locals never visit and that they are not part of the fabric of city centre life. It recognises the difficulties of upgrading them in the context of diminishing budgets but suggests that if they were to develop cafes and shops, host functions and stage events they would be more central to city life and generate additional income. The number of museums and attractions is in fact in line with that of most small heritage cities and towns (for example Shrewsbury, Salisbury or Durham). But it is true that visitor numbers are modest and that facilities for visitors have lagged behind those in many museums elsewhere, due to a lack of recent investment and intrinsic limitations of space in Lancaster's museum buildings. These matters are discussed in the following section.

308. One can question the specific reference to a 'Georgian Gem' as the basis for promotion, not because it is untrue but because it does not embrace the forward-looking aspects of Lancaster as a modern heritage city including its universities which are emphasised in the LM Vision. The ambition to be a 'Bath of the North' provides a welcome aspiration to attract many more visitors and improve the standards of museums, accommodation and eating places; but Bath has been a resort for centuries and that has defined its character. Lancaster has been a different place – a working, provincial town with its own character. Historically it has not gone out of its way to entertain visitors in the way that Bath – or indeed Canterbury, Chester or York have. There are no grand crescents and hotels, no racecourse or Mansion House. It doesn't have so many buildings that are overtly ostentatious – though the Ashton Memorial and Town Hall are bold exceptions to

that rule. Its character is determined not primarily by grand buildings but by a concentration and consistency of period buildings of quality around its core²⁶.

309. However the broad argument of both documents is that the **heritage creates a defining asset for Lancaster and can be of greater value to its economic, social and cultural life than it is now**. That view has clearly influenced subsequent strategic thinking and the outlook of those consulted for this present study. And so it is a reasonable starting point and premise that needs to be tested in this Strategy.

²⁶ While Bath has 98 Grade 1 listed buildings , Chester has 76 and Carlisle 55, Lancaster has 25; but Lancaster has overall more listed buildings of all grades (1393) than Carlisle and almost as many as Chester. Source: *Heritage Counts*, English Heritage 2006

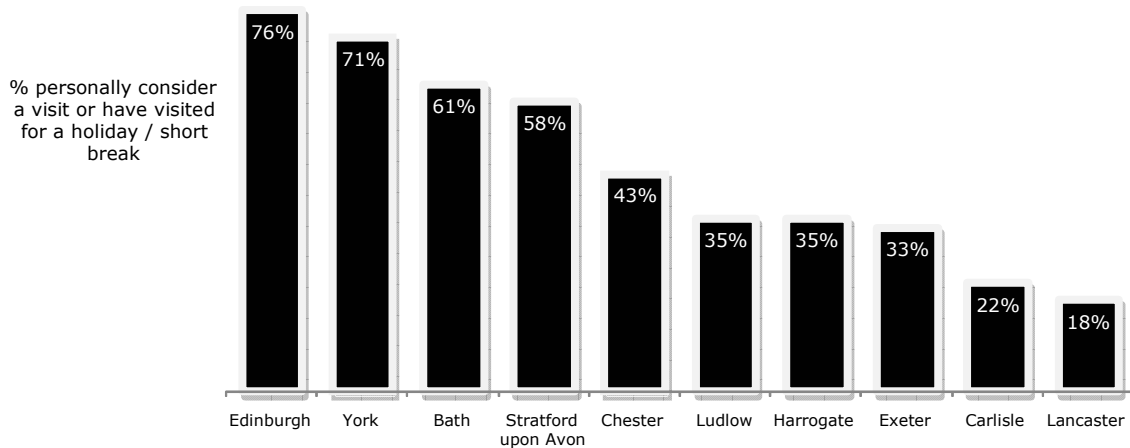
4 HOW LANCASTER COMPARES AS A HERITAGE CITY

401. How does Lancaster match up as a heritage city, as a place to live and work, as well as a destination to visit? In this chapter we provide an overview of the standing of the city, making some comparisons with other towns and cities to gauge the strength of Lancaster’s claim to be a heritage city. We go on in subsequent chapters to audit elements of Lancaster District’s urban fabric and its cultural heritage attractions to identify strengths and weaknesses in more detail.

COMPARISONS

402. Comparisons with other heritage cities allow us to assess where Lancaster sits in the scale of prestige and to learn about the characteristics of successful historic cities. There is a more detailed assessment of Bath, Chester and Carlisle in an Appendix.

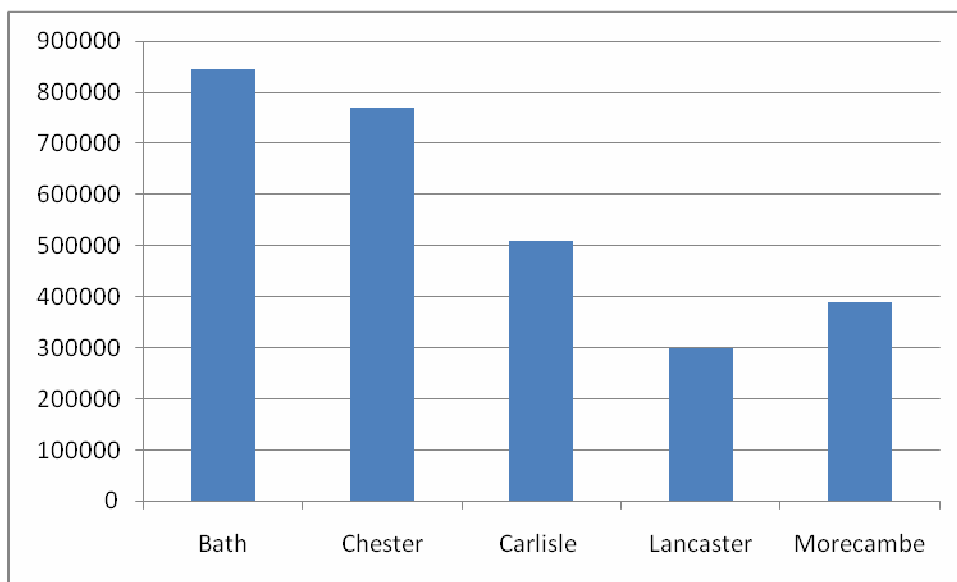
403. Firstly, research indicates that Lancaster has a low profile as a heritage destination and for most people, whether in or outside the NW region, Lancaster is not on the radar as a candidate for a visit or a break²⁷.



Sample: All respondents who have taken a UK holiday in last year

²⁷ Source: NWDA Perceptions Research 2009. Focus group research for the *Heritage Tourism in England's NorthWest* report (Blue Sail 2010) also indicated very limited awareness of Lancaster as a destination.

504. When it comes to visitor numbers there is a ‘premier league’ of historic cities, including Edinburgh, York and Bath. Chester aspires to be in that league but no other destination in the North West comes close. The table below indicates the annual number of staying visitors to each city²⁸



405. The leading heritage cities in the UK generally have a long tradition of attracting visitors over many generations. For example Bath built elegant Assembly Rooms and lodging houses to accommodate visiting gentry, York entertained visitors in its Mansion House, Cheltenham developed its spa and Chester has held races for centuries. They acquired a reputation as places of resort and entertainment and developed the infrastructure to serve visitors. They have been able to build on these foundations in more recent times. By contrast Lancaster does not have a tradition of attracting visitors and so did not acquire an equivalent profile or range of facilities.

²⁸ Figures from STEAM 2007/2008. By using staying visitor numbers we will exclude most shopping and routine business visits.

406. Analysis of the most successful heritage cities, such as Bath, York, Stratford and Chester suggests they combine strong heritage elements with a rounded offer that appeals to visitors²⁹. Typically they offer:

- ▶ A 'full day out' with plenty to do – heritage attractions that are fun as well as educational, combined with other things to do and see
- ▶ A leading, 'must-see' attraction or attractions that motivate visits
- ▶ A strong and distinctive retail and eating offer in a historic setting that manages to provide both independent and national brand stores
- ▶ Attractive hotel accommodation in the city centre, especially in historic buildings³⁰ and often offering leisure facilities, spas and 'pampering'
- ▶ A well-cared for public realm that is easy to find one's way around on foot with measures taken to manage and reduce the intrusion of traffic
- ▶ Organised tours, on foot (or sometimes by boat or bus) with themed variations such as ghost walks or comedy tours
- ▶ In many cases an attractive, busy waterfront
- ▶ A strong cultural and festivals offer³¹

407. By contrast Lancaster's offer does not appear so strong or so rounded. The offer will be examined in more detail in the following pages but may be summarised as follows:

- ▶ A cluster of heritage attractions which has lacked recent investment, leaving them short of the standards of presentation and interpretation achieved elsewhere

²⁹ www.heritagecities.com shows how they promote their offers.

³⁰ As examples: the Royal Crescent Hotel in Bath, The Judges Lodgings in York and the Grosvenor Hotel in Chester

³¹ Cheltenham is a leading example of a 'festival city' with both a variety of cultural festivals and a horseracing festival.

- ▶ No attraction that could be described as 'must-see': modest visitor figures bear this out
- ▶ A retail offer with strength in independent shops but lacking depth in larger stores
- ▶ Eating places that have not achieved more than local recognition
- ▶ Relative weakness in city centre accommodation in character buildings despite some recent openings
- ▶ A concentration of high quality historic buildings set in a public realm that appears tired and suffers traffic intrusion
- ▶ A highly distinctive waterfront but one that feels somewhat disconnected from the city centre and lacks bustle
- ▶ A strong performing and creative arts scene that helps to animate the district and the heritage and contributes to the 'rounded offer' that visitors seek.³²
- ▶ A festivals programme of some quality that could achieve wider recognition.

³² A recent study of the *Economic Value of Arts Activity in the district of Lancaster* (Genecon 2011) indicated that some 600 businesses and organisations are involved in the arts in the district and that the arts sector contributes between £50m and £85 GVA per annum.

5 LANCASTER DISTRICT'S BUILT FABRIC

501. In this section we summarise the condition, appearance and 'fitness for purpose' of the built fabric of Lancaster District's cultural heritage, drawing on documentary sources, consultation with stakeholders and on our own observation.

Lancaster's Heritage Character

502. In Lancaster there are a number of distinct character areas, each rather different. The principal areas, all included in existing or proposed extended conservation areas, are

- ▶ The Castle precinct, including the Priory, of medieval character
- ▶ St George's Quay, an assembly of mainly 18th century warehouses
- ▶ The core of the city centred on the Market Place, largely Georgian in character, including pedestrianised streets and Dalton Square and the neo-classical Town Hall
- ▶ The canal corridor with a surviving early Victorian street plan and early nineteenth century domestic, church and industrial buildings on the city side; on the other bank is the Catholic Cathedral
- ▶ The area of Victorian character to the south of Meeting House Lane including terraced housing and the Girls' Grammar School

503. The essential point is that Lancaster is already highly distinctive and full of character. In the consultations and Think Tanks it was apparent that people like the distinctive character they see now and do not want the area transformed into a different character. Rather they urged strongly that the existing gems need to be polished, that the area's image needs to be honed, and that the character of its existing distinctive areas should be preserved and made stronger. Nor was there a wish in general to increase the scale of the city. While LM Vision speaks of a need for some growth to achieve sufficient critical mass in terms of population, housing, retail and culture, it stresses that there should not be urban sprawl nor a change to the nature of Lancaster as a self-contained medium-sized city.

The Public Realm in Lancaster centre

504. The most consistent message in consultation and the Think Tanks is that the public realm in the city ought to create a 'sense of wow', but that at the moment it doesn't match expectations of a 'heritage city'. Many stated that aspects of the design of the public realm are unimaginative. The Market and Sun Squares were described as tired and the Castle Precinct as poorly presented and interpreted. Further issues related to connectivity; though Lancaster is a compact city it was

felt not to be an easy place to find one's way about³³. The A6 loop road causes dislocation and traffic noise. Its intersections with pedestrian streets were felt to be particularly awkward.

505. At the most basic level, maintenance and cleanliness were not considered good enough. Consultees felt it portrayed a lack of pride in the place. Local people are possibly more critical than visitors who in surveys mark the cleanliness of streets in both Lancaster and Morecambe only a little below the average for historic towns.³⁴ However a short 'first impressions' report commissioned by the City Council put the point bluntly:

*You need to be aware that the standard on what I'd call 'basic MOT for Lancaster and Morecambe' is simply not good enough when your vision screams quality. For example, exterior cleanliness of buildings, litter, areas of 'grot' and disused spaces are evident. These can be managed at a cost far lower than some of your more aspirational schemes in the vision and will make a big impact/difference on the psychology of place. They are 'quick wins' and signal your intention about quality for the future.*³⁵

The Town Hall and Dalton Square Statuary

506. The neo-classical Town Hall opened in 1909 was the gift of Lord Ashton and is Grade 2* listed. Guided tours of the principal rooms are occasionally available. A recent review and evaluation of uses of the building has taken place and concluded that it should remain primarily in administrative use by the City Council.

507. The Town Hall and Dalton Square contain the most important statuary in Lancaster. The War Memorial, dedicated in 1924, stands in a small garden of remembrance on the east side of the Town Hall, and has been carefully conserved. The Queen Victoria memorial in the square, listed Grade 2* and dating from 1906-07, includes a relief of eminent Victorians. A visual inspection

³³ The *Destination Benchmarking* report cited above also reported low or declining visitor satisfaction levels for finding one's way about and for information boards and display maps; visitors also found the one-way system in Lancaster difficult.

³⁴ *Destination Benchmarking: Trend Analysis Report 2002-2008* England's Northwest Research Service operated by the Mersey Partnership.

³⁵ *First Impressions*, Comedia, 2007

suggests its condition is deteriorating and it certainly does not appear to its best effect.

City Council owned sites and buildings

508. It has been commented that nearly all the listed buildings in the City of Lancaster that are owned by the City Council are in fair / poor condition and at least one building can be considered to be at risk. There has been no significant investment in planned maintenance and many of these buildings look uncared for and give a poor image of an historic city. The Roman Bathhouse and the archaeological site of Vicarage Fields, a scheduled ancient monument, are in poor condition though funding has been made available for essential repair and conservation work to the Bathhouse. The use of S106 planning gain funds could provide funding towards public realm works and repairs of historic buildings.

The River and the Quays

509. St George's Quay has been described as 'possibly the finest remaining maritime quarter in England'.³⁶ The Customs House and warehouses now house the Maritime Museum, pubs with accommodation, small businesses and some residential properties. While the buildings have remained the appearance and bustle of a working quay have not. The flood protection wall obscures the view of the river on which there is little boat traffic. Traffic on the north side of the river intrudes on the scene. The hopes of the Lancaster and Morecambe Vision for a weir to retain water in the river have not been fulfilled. Consultees are concerned to improve the path connection between the Castle precinct and Quayside. Some expressed regret at the demise of the Maritime Festival which used to centre on the Quay and brought sea-shanty music and visitors to the area. There seem to be few people out and about on the Quay at present and it is quite hard to envisage the hive of activity that once took place here. The Quay does not quite live up to its promise as a place to visit, in our view.

The Lancaster Canal Corridor

509. Lancaster Canal skirts the east side of the city centre before running north and crossing the Lune aqueduct. In January 2011 the HLF granted £1m towards the restoration of the aqueduct, matching the contribution of British Waterways.

³⁶ In *Historic Towns in England's Northwest*, Edaw and Locum for NWDA

The scheme includes landscaping, access and lighting works together with teaching resources aimed at local schools³⁷.

510. In central Lancaster the Canal provides a pleasant green corridor and a haven for wildlife. Former warehouses and mill buildings have been developed for public house and educational uses. Canal boat cruises and some limited boat hire are available. The canal corridor contains several listed buildings and other period buildings of value but is marred by demolition sites and generally poor upkeep. A development proposal (the Centros Scheme) for a mixed development of retail, shopping and leisure proved highly controversial and was refused planning permission at public inquiry in 2009. Objections were raised on grounds of transport and traffic issues, on the scale and quality of buildings and the impact on the existing retail areas, but particularly on grounds of its impact on heritage buildings and streetscapes. However the main objecting agencies and groups agreed that in principle the regeneration of the area is desirable.

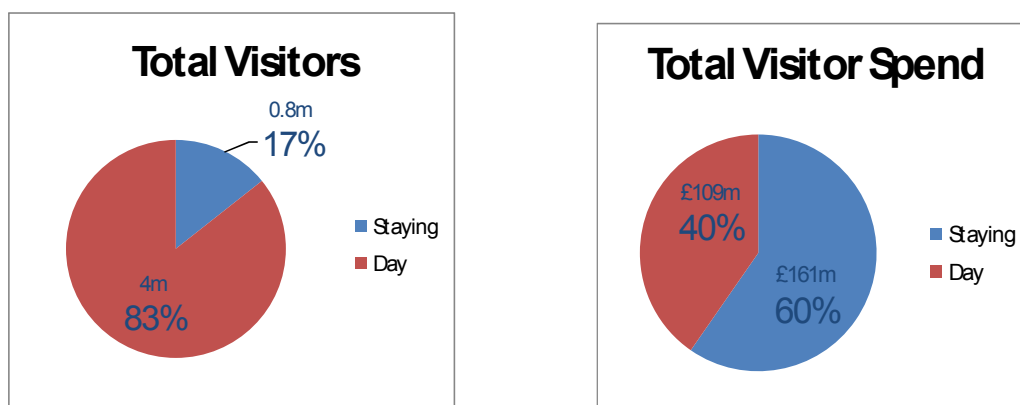
511. Among our consultees there was general agreement that re-development is necessary and that this is an opportunity to shape an area in a positive way that complements the character of the city. Opinion was divided on the issues related to shopping, between those who felt the current offer is weak and needs a large store and brand names to make it attractive, and those who fear it will threaten the independent shops and lead to a 'clone town' appearance.

Accommodation in the historic centre

512. Staying visitors are the main economic opportunity for the tourism sector. The charts below show that 83% of the 4.8 million visitors to Lancaster district are day visitors but it is the 17% staying visitors who spend the most - 60% of visitor spend. A staying visitor spends seven times more than a day visitor – highlighting the economic importance of staying visitors.

37

<http://www.hlf.org.uk/news/Pages/%C2%A32millionoverhaulforwonderofthewaterways.aspx> gives information on the Lune Aqueduct scheme



. (Source: 2008 STEAM report)

513. The presence of excellent, even prize-winning places for visitors to stay is therefore important both for economic benefit and to lift the image and profile of the destination³⁸. Occupancy figures do not suggest a general lack of hotel accommodation in Lancaster district; but a few years ago there were few if any aspirational places to stay in the city centre. Since then at least three smallish town house hotels of character and quality have opened, which makes the city a much more attractive place to stay for an upmarket sector. This trend is welcome but the offer is still limited in relation to that of other heritage cities.

Morecambe's Heritage Character

514. Morecambe's character is different from Lancaster's and its strongest card is not cultural heritage but its environmental advantages – its outstanding position on the Bay with all that entails – the views, the beach, the promenade and the wildlife.

515. However the history and buildings of Morecambe provide a context. There are a number of character areas:

- ▶ The East End which includes the original Poulton fishing village with some 18th century and earlier buildings

³⁸ Not all staying visitors stay in serviced accommodation, of course. In Morecambe more than 70% were staying in a hotel whilst for Lancaster this figure was just 38% with 52% staying at the home of a relative or friend. An improved range of accommodation may encourage people to stay in visitor accommodation, contributing more to the economy.

- ▶ The central Marine Road area, including the former railway station, stone jetty, Midland hotel and Winter Gardens
- ▶ The West End, typified by tall seafront lodging houses and substantial terraced housing in Victorian streetscapes
- ▶ Lower and Higher Heysham, retaining a village character including the ancient church and chapel

The Poulton and Central Promenade areas are included in the Morecambe Conservation Area. Part of the West End is included in another, smaller conservation area.

Victorian and Edwardian Streetscapes

516. Consultees felt strongly that the Victorian and Edwardian built heritage is well worth preserving and that with appropriate care and restoration can provide spacious and characterful accommodation for residents and businesses. Unfortunately many interesting buildings and streetscapes are marred by inappropriate repairs, fascias and adaptations or are undermined by a lack of maintenance. The first Morecambe Townscape Heritage Initiative (THI), focussed within the Morecambe Conservation Area, facilitated key projects such as the Midland Hotel restoration and Housing Renewal and Shop Front Improvement schemes. The ambition to implement the second THI scheme in Morecambe is clearly stated in the City's Corporate Plan.

Art Deco

517. The Midland Hotel is a fine art deco building now fully restored. The existence of a number of other art deco buildings in Morecambe has promoted suggestions that art deco could be a promotional theme for the town. But consultees were generally rather sceptical; some of the examples are hard to find and the predominant character is Victorian and Edwardian. The hotel attracts a discrete market segment with an enthusiasm for the iconic building and the Eric Gill artwork; for many of its guests it is the hotel rather than the town of Morecambe that is the attraction. According to the hotel manager they do not necessarily display interest in other aspects of the natural or built heritage.³⁹ So in our view a themed promotion of Morecambe for its art deco townscape would lack credibility.

The Promenade

518. Morecambe's Promenade is a key heritage feature of the resort and has benefitted from substantial refurbishment over recent years which has included

³⁹ Source: General Manager, Midland Hotel.

artworks (the Tern project, Eric Morecambe statue and other features) and the creation of the innovative West End gardens. Further improvement to the promenade landscape, gardens and artworks would complement the ongoing regeneration of areas of the town.

Heysham Village

519. Heysham Head and the village are of considerable historic interest, enhanced by the excellent views over Morecambe Bay. Heysham Conservation area is designated to protect the character of the historic village and the open spaces surrounding it. Heysham Head is owned and managed by the National Trust while the voluntary Heysham Heritage Association (HHA) manages the Heysham Heritage Centre with support from the Heritage Trust for the North West. The Heritage Centre has proved popular since it opened in 2000 with around 20,000 visitors a year and provides a focal point for a visit. The HHA deserves support in its current project to repair and extend the centre. Heysham is worthy of greater promotion and profile than it currently has.

6 LANCASTER DISTRICT'S CULTURAL HERITAGE ATTRACTIONS

601. In this section we examine the nature and operation of the recognised heritage attractions in Lancaster, noting the views of consultees where appropriate and appraising their appeal for visitors, their impact and sustainability.

Heritage Attractions open to the public

602. Lancaster has a cluster of visitor attractions, each attracting rather modest visitor numbers. This is not so different from the position in other 'second tier' heritage cities. Carlisle has four historic attractions plus its cathedral and churches and even Chester has similar numbers. All but one of the attractions in those cities receive less than 100,000 visitors and so are in a similar league to Lancaster's. York and Bath are, however, at a different level altogether with 14 or 15 paid attractions jointly attracting several million visitors in each city.

Lancaster Attractions	Visitor numbers 2009-10	Admission charges	Ownership	Management
Castle tours	37797	Yes	Duchy of Lancaster	County Museums Service
City Museum	49383	No	Lancaster City	County Museums Service
Maritime Museum	15597	Yes	Lancaster City	County Museums Service
Judges Lodgings	9085	Yes	Lancashire County Council	County Museums Service
Cottage Museum	3637	Yes	Lancashire County Council	County Museums Service
Ashton Memorial	30,000 (estimate)	Yes *	Lancaster City	Lancaster City

* Admission to Williamson Park is free and estimates of annual visitors are in the region of 150-250,000. Admission charges are made to the Butterfly House and the Memorial.

In addition Lancaster Priory and Lancaster Cathedral are open for visits though of course they are principally places of worship.

The Castle

603. Parts of the Castle are open to the public but most of the building has been used as a prison and is not accessible. Visitor access is by guided tour; it lasts around an hour and takes in some of the cells, the Jury room and the courts including the Shire Hall described by Pevsner as 'one of the most appealing rooms in the Gothick style to be found anywhere'.⁴⁰ The tour is curtailed when the courts are sitting, often at short notice which makes promotion difficult. Entry is by a door at the rear of the Castle - not so easy to find – rather than by the 'main' entrance, the John of Gaunt Gateway. There is a small retail outlet but no cafe; space for visitor facilities is very limited. The Castle tour, like all Lancaster museums, has achieved Visitor Attraction Quality Assurance Scheme (VAQAS) accreditation.⁴¹

604. Staff who lead the tours are encouraged to research and devise their own tour content and there are 'special' tours such as the 'Dark History' tours by candlelight and Halloween events. These tours are clearly well liked by visitors. The following review from TripAdvisor is typical:

I did not expect to enjoy this tour to the extent that I did but it was a wonderful way to spend an hour or so! Lots of stories of crimes and trials and olde-worlde torture and hangings. Gruesome and completely fascinating!!! The walls really have stories to tell and the old courtrooms, still in use today were a joy to visit. And we also heard the story of the Pendle witches which was a highlight. Don't miss it!!

605. The Castle also frequently hosts well-received drama and opera performances, sometimes on a promenade basis and sometimes in the courtrooms. Capacity is limited to around 120 at most by the size of the rooms used. The current uses by the Courts Service prevent expansion of this activity at present.

606. Consultees identified the Castle as a key strength of Lancaster's offer and were positive about the guided tours. Our appraisal is that the Castle does what it can, and does that well. As things stand, however, its attendance figures are very modest in comparison with major heritage attractions elsewhere. It needs to

⁴⁰ C. Hartwell and N. Pevsner *Lancashire North* (2009, Buildings of England Series)

⁴¹ VAQAS is VisitEngland's consumer focussed quality scheme which assists attractions to identify strengths and weaknesses and development opportunities.

overcome severe constraints that prevent it from realising its potential to generate significant visits to Lancaster.

607. Consultees were more critical of the presentation and interpretation of the area around it, the Castle precinct. Some felt that the significance of the site does not come over and that the archaeology is poorly presented and interpreted. One comment was that if the Roman Bath House cannot be better presented the excavation should be filled in to ensure conservation. The trees in the precinct were criticised for blocking the view of the Castle from the city and from the Castle to the Quay; there were comments that visitors could quite easily miss the Castle given that is 'tucked away' from the centre and separated by the A6 road.

608. The future of the Castle as a visitor attraction is uncertain. The Duchy of Lancaster which owns the building wishes to renegotiate its lease to the County Council and the Courts Service. Additionally the Courts Service has indicated its intention to move to new courts – if and when they are constructed. While that would release space allow fuller use of the existing courts as a visitor attraction it would also leave the County Council to shoulder increased rental and maintenance costs. The present restrictions on public spending increase the uncertainties and doubts about the sustainability of the Castle as a visitor attraction. It must surely be a high priority to keep that access going – without it Lancaster's claim to be a heritage destination would appear hollow indeed.

609. The main section of the Castle has been occupied by the Prison Service and there has been no public access up to this time. The Prison has recently ceased to operate and has been vacated. This raises exciting possibilities for a major new heritage attraction which is considered in section 11.

The Priory

610. The Priory Church of St Mary's stands within the Castle Precinct and its fine quality has been recognised by its recent raising to the status of one of England's 'Greater Churches'. It is open to visit daily with free admission and is an excellent complement to a visit to the Castle (and to the Judges Lodgings also nearby) and there could be strong cross promotion between them. Refreshments are available in the Refectory. The Priory is looking to develop its profile including use for concerts. Arguably the presentation of the Church to visitors could be a little less low-key - without spoiling the essence of the place. There could be more to interpret its fine features to visitors; guided tours are available by arrangement but

there is for example no AV guide or guide book; a smartphone app⁴² would be useful.

The City Museum and King's Own Royal Regiment Museum

610. The City Museum is located in the former Town Hall on the Market Square in the heart of the city. Its collections reflect the history of Lancaster and Morecambe from prehistoric times to the twentieth century. The two main ground floor rooms are used for changing exhibitions including shows of local artists' work. The City Museum incorporates the King's Own Royal Regiment Museum which presents the story of soldiers, campaigns and the military life from 1680 to the present day, through collections of uniform, photographs, works of art and medals. The regimental museum has an enquiry service and web site that helps visitors with the increasingly popular familiar history searches.

611. Consultees had relatively little to say about the City Museum and Regimental Museum but commented that it seemed to have had little investment or change over the years. Lancashire County Council which manages this and other museums stated that it has the expertise to develop a more interactive experience and introduce visitor facilities such as refreshments but any capital investment would need City Council support; it would be happy to negotiate a revised and flexible service agreement with the City but needs to know what the City's ambitions for its museums are.

612. In our assessment the City Museum and Regimental Museum present strong collections of historical significance and use them well to tell stories of relevance to local people and of some broader interest to visitors. **A key weakness is the lack of space in the building** which constrains displays, public facilities, education and collections management. The museum displays have not had recent investment. As a result they do not come over as interactive or particularly up to date or dynamic. The exhibition galleries on the ground floor allow the Museum to offer something that changes regularly, but the shows of local artists appear somewhat parochial and are not likely to generate visitors from further afield.

613. The Museums occupy a landmark building in a prime position in the centre of the city. They should be a central part of city life but they feel peripheral. The

⁴² A smartphone app (or application) is a software download to a mobile phone which can carry, for example, a guided tour to a visitor attraction or provide information to visitors about a destination

exterior is poorly maintained and unwelcoming. The building is clearly in need of repair and attention, (including stone-cleaning if that is practical). Large trees overshadow the New Street side of the building. The museum content offers little change and there is no cafe and limited retail. There should be more reasons for local people to visit regularly and for visitors to seek it out.

The Maritime Museum

614. The Maritime Museum occupies the former Custom House and an adjoining eighteenth century warehouse in a prominent position on St George's Quay. It is open daily throughout the year. The museum illustrates the 'Golden Age' of Lancaster's maritime trade and prosperity in the eighteenth century but also relates the story of Morecambe's fishing tradition, its halcyon days as a resort and the ecology and natural history of the area. An AV presentation interprets the area of the Quayside, the Lune and Morecambe. There is a traditional Morecambe 'Nobby' fishing boat in the museum and two boats stored in the open courtyard. The Museum has a shop at its entrance and a cafe upstairs.

615. The Museum tells a key part of Lancaster's story but its scope as a maritime museum is limited by its scale and its inability to display vessels on the water nearby. It also feels a little isolated from the centre of the city with low footfall. These things no doubt impact on its relatively low visitor figures. We do not anticipate a major growth in its figures but it is important to the vitality of the Quayside that the Museum presents a lively and welcoming face.

The Judges Lodgings

616 The Judges Lodgings is the oldest and finest town house in Lancaster; the building itself is the key exhibit. It is set out partly as a furnished house, featuring original Gillow furniture and period room settings, akin to a National Trust property. But it also has more formal museum displays and museum of childhood. It has a small walled garden with period rose bushes. No refreshments are available. The Judges Lodgings is open 6 months a year. There is an active education service providing participation, role-play and object handling sessions for pupils to give an insight into life for children of their age during the Victorian Era.

617. Consultees commented that there appears to have been no investment in the venue for 25 years and the interpretation has been described as 'information-dense'. Some feel that the inclusion of the children's museum is out of character with the rest and makes the experience something of 'a mixed bag'. The lack of visitor facilities was noted and comparisons made with the National Trust which would prioritise good facilities including an attractive tearoom.

618. The Judges Lodgings is a splendid building in a good position below the Castle but with visitor figures of around 9000 it is not making a big contribution to Lancaster's heritage offer. It seems underused; with the exception of the education service there seem to be few other uses of the building to allow more people (whether visitors or locals) to experience it. The County Council would like to improve disabled access, open up the garden and develop a shop, but the building is not a priority for the service at present. Major investment seems unlikely in the foreseeable future with the current constraints on public sector spending.

The Cottage Museum

619. This tiny museum in an eighteenth century cottage near the Castle is set up to provide a glimpse of Victorian life. It is open each afternoon between Easter and October and is a popular visit for educational groups. The building is so small and so cut off from mains services that no further development is feasible.

The Ashton Memorial and Williamson Park

620. The Ashton Memorial is an iconic feature of Lancaster. Standing at the high point of Williamson Park it presents a powerful profile to travellers on the motorway. The park of some 54 acres and the Memorial are open daily with free admission to most areas but car parking charges are made. Management of the site was devolved about 20 years ago to an independent trust but following financial difficulties the trust is being wound up and the City Council is regaining full management responsibilities in 2010.

The features of the site are as follows

- ▶ Landscaped park with walks, water features, monuments, play area; Some improvements and restoration carried out with HLF grant support c 1999; listed Grade II on the Register of Parks and Gardens of Special Historic Interest
- ▶ The Ashton Memorial: Grade 1 listed building; long distance views from upper floors; art gallery on second floor shows changing exhibitions of local work; access to upper floors by stairs – no lift; used for concerts and popular for wedding ceremonies (100 a year)
- ▶ Butterfly House sited in the former Palm House; admission charge includes mini-beasts etc Some recent refurbishment of the presentation but long term concerns for condition of the building
- ▶ Mini beasts, animal garden and aviary in enclosure

- ▶ Educational activities for children (2580 children a year)
- ▶ Cafe and visitor facilities sited in a lightweight structure formerly used at a Garden Festival; some recent refurbishment but the structure said to have a limited lifespan; gross takings c.£200,000 a year
- ▶ Plays in the park: annual seasons of plays mounted by the Dukes Theatre which have achieved regional and national recognition.

621. The park is well-used; an estimate made in 2008 suggested at least 150,000 users a year. The most popular activities are to go for a walk, get some fresh air, and look at the views over the surrounding countryside.⁴³ Visitors are predominantly local. A survey found 82% of those interviewed were from the Lancaster district; of the remainder a little more than half were from other parts of Lancashire and around 7 or 8% were from elsewhere. These figures suggest that visitors from outside Lancashire could be in the order of 12,000 a year.

622. Consultees often referred to the Ashton Memorial and the park as iconic and acknowledged the profile of the promenade plays. But they expressed a sense that these assets are not delivering their potential especially as an attraction for visitors. One reason offered is the connectivity of the park with Lancaster – it is a 25 minutes uphill walk from the centre.⁴⁴ It was also suggested that the product needs to be ‘commercialised’, for example with better local food, acceptance of credit cards, the selling of wedding services such as catering and photography and a Caravan Club site in the park. More generally it was suggested that the site needs to be aligned with the overall objective of presenting Lancaster as a heritage city and destination.

623. The questions remain whether, and at what level, additional investment would be justified to expand the appeal so that the site attracts more users and more visitors to Lancaster. The City Council should consider inviting private sector interest in developing and managing visitor facilities and activities at Williamson Park to augment any public sector investment in the heritage fabric.

⁴³ Williamson Park Audience Development Plan, Sept 2008, for Williamson Park Ltd in preparation for a proposed HLF Parks for People funding application. Includes A survey of 370 park users (May 2008) and a non-user survey.

⁴⁴ Source as above; a non-user survey in 2007 found the main reason for not visiting was the perception that it was difficult to get to.

The Winter Gardens

624. The Winter Gardens, dating from 1878, is one of the remaining grand symbols of Morecambe's heyday as a popular seaside resort. It has a strong appeal to those interested in the cultural heritage of the music hall traditions of Morecambe and its association with Morecambe and Wise and Thora Hird. It is now owned by an independent trust whose objective is its restoration and re-opening for entertainment and other uses. The building underwent a degree of restoration in the mid 1990's which has secured its fabric for the time being. However it has been mostly closed as a venue for entertainments since 1977 (though following appearances on TV's 'Most Haunted' programme, it is regularly booked for ghost-hunting presentations). In holiday periods it has open days and offers guided tours.

625. In recent years proposals have been made for redevelopment as a museum of comedy and, more recently, as a multi-purpose entertainment venue estimated to cost c. £12m. An application by the Trust for Sea Change funding support, for which considerable preparatory work was commissioned, faltered because the City Council was unable to confirm capital match-funding and revenue support. The real difficulty appears to be in establishing a credible business plan for the venue as a performance space (which is the prime ambition of the Trust) without a substantial level of subsidy from the local authority. Some consultees express concern that the Council's financial support for the arts could be diverted to maintain it to the detriment of cultural provision throughout the district.

626. To this point efforts to find a way forward towards a permanent use of the building which retains its performance character have not succeeded. It would seem appropriate for the Morecambe Area Action Plan to consider its future uses as part of the wider regeneration planning for Morecambe. For the moment a holding operation to keep it from deterioration is appropriate.

An overall assessment of the heritage attractions

627. Having a number of small attractions poses several challenges. Consultees stressed the need for connectivity between the attractions, particularly in Lancaster city, to create a critical mass of interest. That puts a premium on good signage and information in the city. It suggests a need to promote the attractions together as a heritage offer and underline Lancaster's character as a heritage city. The 'Heritage Revealed' is a thematic promotion of Lancashire and Blackpool Tourist Board and its Lancaster Heritage Trail brings it all together. The Lancashire Museums Service produces a Lancaster Historic City leaflet covering most of the attractions and its museum Xplorer ticket is a form of cross selling.

628. The visitor numbers to each site are at level that makes it difficult to sustain a good cafe and retail provision. A recent study⁴⁵ on income generation opportunities for Lancashire museums found that 'the main areas of deficit, compared to the national picture, are in retailing and catering. In particular, the level of retail spend per head at Lancashire County Museum Service is very low compared to almost every comparator figure, suggesting that this is one priority for action'. The report argues that improving the retail element requires much less capital and resource than improving catering.

629. Catering requires expertise as well as investment, but a good cafe can transform the experience of a visitor and is now widely expected by museum visitors. A future extension and re-modelling of the City Museum could include a cafe to take advantage of its prime city-centre site and open the building to new visitors.

630. All the museums occupy historic buildings, not designed as museums. The buildings themselves are at least half the attraction but pose challenges to the presentation of the collections. Despite those constraints the museum presentations need investment to update them to standards other museums are achieving. Visitors want heritage to be entertaining, interactive and fun, as well as educational. It is not clear that Lancaster's museums are offering that, with the exception of the Castle tours. Without that investment and updating Lancaster's museums risk being left behind and ultimately becoming negative elements of the heritage offer.

⁴⁵ 'Income Generation for Lancashire County Museums Service' , PLB Consulting for Lancashire County Council 2008

7 THE MANAGEMENT OF LANCASTER'S CULTURAL HERITAGE

MANAGEMENT OF THE CULTURAL HERITAGE

701. Many sectors, departments and organisations have a stake in the cultural heritage. The Local Strategic Partnership is in the natural position to coordinate support and action among partners. It is important that it should adopt the Strategy, monitor its implementation and consistently speak and act in ways that shows the value it places on the cultural heritage.

702. The City Council has a key role in implementation and in facilitating collaboration. It has responsibilities as the planning authority, as the owner and manager of cultural assets and for regeneration in liaison with the private sector. The structure of the authority has been reorganised recently and some consultees were unsure where responsibilities lie. However it is clear that the heritage is a cross-cutting concern and all departments need to play their part.

703. Businesses and the City Council are discussing the possibility of a Business Improvement District which subject to a positive vote by businesses would levy extra rates for an agreed programme of action. The actions could be about managing the public realm - for example intensive cleaning, security, more police and enforcement officers - marketing such as running city centre events and bringing speciality markets to the city, and sustaining businesses for example through trade recycling services and networking events. The City Council may be able to fund capital improvement work by borrowing against the income stream from the BID if the partners agree.

704. The voluntary sector looks after several historic buildings in the district notably the Winter Gardens (the Preservation Trust and Friends organisation), the Heysham Heritage Centre (Heysham Heritage Association) and Mona House, Poulton (Heritage Trust for the North West). These local organisations make a cost-effective contribution to heritage management and the local authorities should as far as possible maintain the financial support, even if quite modest in amount that is so important to the continuation of these organisations.

705. Arts companies directly support the heritage by occupying historic buildings – the Grand Theatre being in continuous use since 1782 while the Dukes Theatre occupies a converted church. The Grand wishes to extend the building to provide a larger and upgraded foyer which will increase enhance the theatre experience

and allow increased community use. The theatre has been fundraising since 2007 and is currently seeking further funds to develop the proposal. The Storey Institute is now the Creative Industries Centre. Ludus Dance is based in the Assembly Rooms while the Platform Gallery occupies the former Morecambe promenade railway station. The outdoor plays in Williamson Park and the performances in the Castle bring these locations to life. The Tern project and other public art have been influential elements of the regeneration of Morecambe.

706. Some consultees regret a perceived decline in the number of festivals and events in Lancaster and district. What has diminished primarily is the **direct promotion** of events by the City Council ⁴⁶. Lancaster has a growing Litfest and now a Music Festival in its second year, both independently run with help and support from the Council. Lancaster Unlocked is a partnership event highlighting Lancaster's heritage. In our view it is better for the City Council to support and facilitate 'bottom-up' initiatives for events and festivals than to promote them directly.

707. The Arts Partners already meet regularly but a **cultural heritage forum** that included the City Council, heritage managers, the university and interested local businesses might be a way to coordinate thinking and action to animate the heritage.

708. Reference is made elsewhere to opportunities for private sector involvement in the development and management of heritage attractions – in particular to future development of the Castle and to development of facilities and activities at Williamson Park.

MUSEUMS MANAGEMENT

709. The management of all Lancaster's museums is currently undertaken by the County Museums Service. That includes those it manages on behalf of the City Council through a service agreement. However the City Council has given notice to terminate that arrangement with the County Council and is considering its options.

⁴⁶ A team of officers of the City Council used to promote festivals, including a Maritime Festival and a Georgian Festival but this activity was terminated for financial reasons and because the economic impact had not been effectively measured.

710. The case for all museums to be managed together has rested on economy of scale, access to expertise within the County Museum Service and the ability to coordinate activities and promotion. The options going forward appear to be

- ▶ The County continues management on behalf of the City Council with the opportunity to negotiate a revised Service Level Agreement to address any changes the City believes are needed. This will not in itself resolve the investment needs of the museums which are the major prerequisite of improved performance
- ▶ Lancaster City manages its museums directly; it will mean the engagement of appropriate museum managers and staff (TUPE may apply). A financial appraisal and comparison will be needed, with consideration of how the various skill sets e.g. collections management, visitor services, retail and catering will be met.
- ▶ The City and County Council facilitate the creation of a Heritage Trust for Lancaster to undertake management of the museums. A Trust might also manage Williamson Park and the Ashton Memorial though the City's recent experience of trust management of that location has not been satisfactory. Nonetheless museum trust management has been successful elsewhere – for example in York. A charitable trust structure would have some tax advantages (such as eligibility for Gift Aid) and as a single-focus organisation it could develop an entrepreneurial approach to income generation. Much depends on the right leadership. A museums trust would still be dependent on local authority financial support and the need for capital funding will remain. A Heritage Trust for all Lancaster museums would require agreement of both City and County local authorities. It would fragment the County Council's museums service and may be seen as a dis-economy in that context.

711. In our view a single museums service for Lancaster makes operational sense, provided that an acceptable financial arrangement and SLA can be agreed, whether with the County Council or with a potential Heritage Trust. We think the City Council should first decide what level of museum service it is able and willing to support, with the revenue and capital consequences, and then weigh the options in negotiation with the County Council.

8 THE MARKETING OF LANCASTER'S CULTURAL HERITAGE

801. In this section we describe the market for heritage tourism nationally, and refer to what is known about visitors to Lancaster and district. We then appraise critically the current marketing and communications activity. The appraisal is based on observation of marketing communications in print and online, on discussions with the City Council Communications section, the University of Lancaster, Lancashire and Blackpool Tourist Board, the Bay Tourism Association, representatives of the retail sector and NWDA, and on the discussions in the marketing Think Tank and subsequent Marketing Workshop.

WHO IS INTERESTED IN HERITAGE?

802. Consumer research into Heritage Tourism nationally and in the North West tells us that:

- ▶ 63% of the UK adult population visit heritage attractions
- ▶ Museums are most popular; followed by stately homes, castles and art galleries
- ▶ Internationally, Britain is ranked 4th best nation [out of 50] for its culture and built heritage offer to visitors
- ▶ 75% of heritage visits are 'day visits' [220 million in 2008] – 11% of which were motivated by visiting an attraction [27 million visits]
- ▶ The market tends to be older – affluent couples – plus families and international visitors
- ▶ Heritage must be entertaining, lively and fun to engage visitors - family groups especially
- ▶ Visitors from outside the NW have low awareness and knowledge of the region's heritage assets

803. The research confirms that heritage attractions are an important part of the tourism offer for day and staying visitors, but highlights the low awareness of the NW heritage offer. Visitors are guided by the strength of the profile of cities – there are just a handful of UK destinations that have established themselves as 'top heritage brands'. At the moment Lancaster is scarcely recognised at all as a

potential heritage destination and it must address that issue of profile if it is to succeed in this field⁴⁷.

WHO COMES TO LANCASTER?

804. In 2008 4.8 million people visited the district and spent £270million. Visitors to Morecambe tend to travel less far than those to Lancaster: 33% of the former come from within the NW to Morecambe compared with 27% to Lancaster. 16% of visitors to Lancaster come from overseas but there is little information available to analyse the origins of these visitors. It seems certain that some of the overseas visits happen because there are 3000 international students at Lancaster University, representing 110 nationalities. 30% of overseas students are from the European Community, the next largest groups being Chinese and Indian.

805. Analysis of visitor data shows that visitors to the two main destinations in the district are different:

	Lancaster	Morecambe
Average Age	46	49
Socio-demographic	ABC1	C1/C2
From Lancashire	25%	25%
From rest of UK	59%	73%
From Overseas	16%	2%
Repeat visitors	47%	58%

(Source: 2008 STEAM and Benchmarking Reports)







Mosaic Segmentation

806. The profile of visitors to the two main destinations has been further profiled using Mosaic segmentation⁴⁸ which also shows that the majority of visitors to the two destinations are different. The table below presents the top Mosaic visitor segments for each destination, with one segment common to both destinations (Innate Conservatives). It means that the interests, lifestyles and spending

⁴⁷ Research from various sources, summarised in *Heritage Tourism in England's NorthWest* report (Blue Sail 2010)

⁴⁸ The Mosaic segmentation system classifies the UK population into 15 main socio-economic groups and, within this, 67 different types. It uses data on consumer choices and spending traced to residential areas by postcode. It is used to understand consumer preferences and to tailor messages and offers to targeted groups.

patterns of most visitors to the two destinations will be different and the messages about the destinations should be different and be delivered by different channels. The table includes also our suggestion for additional market segments that could be targeted in future.

	Morecambe		Lancaster	
Current Visitor Markets (see note below)	 <ul style="list-style-type: none"> ▶ C1C2D–30/40s ▶ Unsung heroes, grafters ▶ Mirror/Record ▶ Internet & TV for info ▶ Holiday parks, caravan breaks ▶ Value for money 	 <ul style="list-style-type: none"> ▶ Pillars of community ▶ Press & mags for info ▶ 3-5 breaks/hols / yr ▶ Quality lifestyle ▶ Theatre, classical music 		 <ul style="list-style-type: none"> ▶ Active minds ▶ Press for info ▶ High tech for booking ▶ 4/5 breaks/hols yr ▶ Comfortable lifestyle ▶ Theatre 
Messages	<ul style="list-style-type: none"> ▶ Morecambe Bay ▶ Family day out ▶ Lots to do ▶ Value for money 	Morecambe Promenade & Midland	Lancaster Quality place for a day out, eating, shops	<ul style="list-style-type: none"> ▶ Interesting heritage ▶ Theatres, tours, walks ▶ Shopping & restaurants ▶ City break
Channels	<ul style="list-style-type: none"> ▶ Online ▶ Social networks 	<ul style="list-style-type: none"> ▶ Press ▶ Specialist Magazines 		<ul style="list-style-type: none"> ▶ Online ▶ Digital channels
Possible New Markets	<ul style="list-style-type: none"> ▶ Caring families ▶ Eco/ nature lovers 			<ul style="list-style-type: none"> ▶ Cultured Couples ▶ Learning Families ▶ International visitors

CURRENT MARKETING ACTIVITY

Organisation

807. Marketing of Lancaster as a place to visit is undertaken by a number of agencies:

- ▶ Within Lancaster City Council responsibilities lie with the Communications and Marketing Service which covers corporate communications to local residents as well as marketing to visitors and management of the Tourist Information Centres. A Visitor Economy Development Officer (VEDO) is also in post within the Regeneration and Policy Service, but liaises closely with Communications & Marketing and has produced the current Visitor Marketing Plan.
- ▶ Lancashire and Blackpool Tourist Board (LBTB) structures its promotion through six promotional themes; Lancaster is a lead product in the Heritage Revealed theme while Morecambe is a champion in the Coastal Contrasts theme.
- ▶ Lancaster University's Overseas Programmes Officer promotes the university to foreign students (and also handles accommodation for the large number of overseas families who visit for graduation ceremonies).
- ▶ The Bay Tourism Association undertakes PR activity on behalf of its member businesses.
- ▶ Lancashire Museum Service spent approximately £17,000 on marketing the museums in The Lancaster District. This was spent on a Lancaster sites leaflet, the events programme for two Museums and inclusion in service wide publications (eg Simply Schools and Lancashire's Historic wonders). It also included membership of the Lancashire and Blackpool Tourist Board and VAQAS Visitor Attraction Quality Assessment Scheme. Each museum also had £500 for its own local advertising. The Museums marketing team ceased to exist from August 2010 and were integrated into the County Council's Central team, along with the marketing budget.

808. While LBTB marketing team does liaise with the City Council team on marketing we suggest that **more structured and regular meetings** between LBTB, the City Council and other marketing partners including the universities. There is **significant opportunity for effective partnership working** to share research, develop a marketing framework, agree messages, priorities and focus efforts.

Branding

809. The City's Corporate Plan's aim (also stated in the Visitor Marketing Plan) is:

By promoting city, coast and countryside, we will secure a safe and prosperous community that's proud of its natural and cultural assets and provides lasting opportunities for all.

This strapline is used both in communications with the resident population and on visitor-facing materials such as the Visit Lancaster website. It projects a corporate priority to bring the whole district together. It does not, however, communicate Lancaster's cultural heritage. The Lancaster and Morecambe Vision Board drew up a brief for the branding of Lancaster District but it has not been progressed. To develop brand guidelines, the most cost effective way forward would be for Lancaster and Morecambe brands to be aligned with the brand values developed by LBTB for Lancashire.

Promotion to visitors

810. The following thematic approaches to visitor marketing are being used by Lancaster City Council and broadly tie in with the brand themes for the county used by Lancashire and Blackpool Tourist Board:

Lancaster District Product	Lancaster City Council Campaign Themes	Lancashire & Blackpool Tourist Board Brand Themes
Lancaster	Lore & Legends	Heritage Revealed Theme champions: Lancaster, Pendle, Pennine Lancashire
Morecambe Bay	Outdoor Explorer	Coastal Contrasts Theme champions: Lytham, Fleetwood, Morecambe
Across district	Culture Vultures	What's on Theme champion: Blackpool
Morecambe	Seaside Fun	Family Fun Theme champion: Blackpool
Rural – Lune Valley, AONBs	Outdoor Explorer	Country Escapes Theme champion: Forest of Bowland and Pendle Hill
Food & Drink	Food & Drink	Taste Lancashire cross-cutting theme

811. So the main promotion of the heritage to visitors is through the Lore and Legends and Heritage Revealed themes. The **Lore and Legends** theme, managed by Lancaster City Council, is pitched at the short-breaks market targeting young C1/C2 families. It lists things to see and do on the

citycoastcountryside website. Currently however there is limited product and activity for this market and it is not in line with the profile of current visitors to Lancaster. There is little evidence of tailored family heritage products or educational activity, and no call to action or links to downloads to book activities. It does not offer tie-ins or packages for day or overnight visitors. There is no evaluation carried out to assess the impact of specific campaigns or events and no structured consumer feedback is collated.

812. The **Heritage Revealed** campaign managed by LBTB does engage consumers with activities including an interactive map and Lancaster Heritage Trail. In 2010 LBTB promoted a targeted short break campaign for Lancashire with a heritage theme: “Embark on a Journey”, including heritage attractions, accommodation and Taste Lancashire accredited places to eat. The campaign included the following activity:

- ▶ The creation of 4 treasure trails
- ▶ Two direct mail pieces –design, production & postage
- ▶ Display material for TICs & distribution of trails
- ▶ A5 brochure distributed to 30,000 people actively looking to holiday in the UK
- ▶ Campaign website – embarkonajourney.com
- ▶ Monthly e-newsletters
- ▶ SEO / pay per click activity
- ▶ Press Advertising and press trips/PR
- ▶ Social media programme, blogs, twittering, Facebook and YouTube videos of heritage experts

The campaign therefore was focussed on target markets, used the full array of media and packaged the product effectively⁴⁹. The campaign budget was £73,000 of which Lancaster City Council contributed £625.

813. Lancaster City’s total marketing spend is of the order of £42,000 a year, but the bulk of this goes to produce the annual holiday brochure, to reprint activity leaflets and on ad hoc advertising. Only £1540 or 4% of the total was spent in 2010 directly on heritage promotion – for a guide on the Pendle Witches (£667) and on Lancaster Unlocked (£248) and a small contribution to the Heritage Revealed campaign. This is not enough resource to create a discernible impact.

⁴⁹ Conversion research results will be available early 2011

Marketing Channels

814. Online and digital are now the dominant channels for destination marketing and information. The www.citycoastcountryside site is the main visitor facing website for Lancaster district. It has good, clear navigation but lacks inspirational and in-depth information, calls to action, sales opportunities or listings of relevant featured events. The Lore & Legends page is unappealing and little help to the visitor with no links, maps, or call to action. The campaign is supposed to target families but there is no feature on family activities. Most of the main attractions are included but Williamson Park and Storey Creative Industries Centre are low key, and there is no mention of a university at all. Overall it lacks depth, quirkiness and special interest that would help the area to stand out.

815. Website image areas are small and do not do the area justice – every page needs to be visually enticing to stand up to competition with the Lakes and Yorkshire. A whole sector of information is missing – food & drink. Lancaster has great local suppliers and producers and the trend in travel media currently is local, fresh and seasonal. There are no social media links in the site to Twitter, Facebook, YouTube, or customer review sites.

Print

816. The City Council and LBTB produce high-standard tourism brochures. Individual businesses also produce their own leaflets. Publication of accommodation guides and activity brochures continue albeit in smaller print runs. The overall trend is inexorably towards online media but the role of the City Council and LBTB includes providing routes to market for businesses and the printed destination guide is still a valuable piece of information for many visitors. However, for a theme such as cultural heritage, or a single destination such as Lancaster, budgets are just not sufficient to make any impact with printed information and the majority of marketing activity must be focussed through partnership working (i.e. with LBTB, the universities and Bay Tourism) and online.

Consumer Data and Customer Relationship Management (CRM)

817. Consumer data can be used to analyse and segment by types of visitors and for direct marketing. Lancaster City Council holds a consumer database of around 20,000 records which it uses for e-marketing but does not have a consistent, proactive approach to capturing consumer data to make the most of CRM. LBTB and NWDA hold significant consumer data and some of the records are segmented for visitors interested in culture and heritage. Requested targeted e-shots are possible but have not been specifically developed to promote Lancaster's heritage offer. Lancaster arts companies also have user data that might be used for coordinated marketing, subject to data protection issues.

Research

818. Benchmarking reports for Morecambe and Lancaster as well as STEAM research are available giving value and volume but do not give detailed consumer perceptions and visit motivations. The Tourism Centre based at Lancaster University works to “improve productivity and performance in the region’s visitor economy”. Other departments including the Admissions department have research about student’s motivations to come to Lancaster. Currently there is no mechanism for sharing research between the universities and the City Council.

9 CONCLUSIONS: SWOT ANALYSIS

901. From the audit and analysis, consultation and comparisons we summarise the standing and potential of Lancaster as a heritage city in the following SWOT exercise.

LANCASTER

Strengths	Weaknesses
<p>LANCASTER</p> <p>Context</p> <ul style="list-style-type: none"> ▶ Long & varied history ▶ Current strategic context supportive of investment in the heritage ▶ Strong local pride in the city’s heritage and quality of life ▶ Voluntary bodies involved in heritage development & management ▶ Access to outstanding & designated coast and countryside 	<p>Context</p> <ul style="list-style-type: none"> ▶ Low profile as a heritage city ▶ Little or no growth in visitor numbers and spend ▶ Difficulties in match-funding HLF supported projects
<p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ Castle and associations with Pendle witches, justice and imprisonment ▶ Priory and Cathedral ▶ Cluster of smaller heritage visitor attractions ▶ Ashton Memorial and Park – ‘iconic’ structure visible from motorway 	<p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ No ‘must-see’ attraction ▶ Castle access limited ▶ Visitor attractions short on investment, interactivity, space and visitor facilities ▶ Ashton Memorial rather disappointing in what it offers ▶ Modest visitor numbers to attractions
<p>Public realm and built environment</p> <ul style="list-style-type: none"> ▶ Unspoilt, authentic urban core, sense of place ▶ Georgian character ▶ Attractive environment for work and study, investment ▶ Unique Georgian waterfront ▶ Pedestrianised city centre ▶ Compact scale 	<p>Public realm and streetscape</p> <ul style="list-style-type: none"> ▶ Concerns about design, upkeep & maintenance of the central areas public realm ▶ Intrusion of traffic on A6 loop ▶ Quay and waterfront quiet ▶ Interpretation and direction signage patchy

<p>Amenities and experiences</p> <ul style="list-style-type: none"> ▶ Independent shops ▶ Variety of eating places, including independent outlets ▶ Strong arts, theatre sector ▶ University presence supports events and festivals ▶ Music festival, Litfest, ▶ Some very good local food produces sell at the open markets ▶ 	<p>Amenities and experiences</p> <ul style="list-style-type: none"> ▶ Limited city centre visitor accommodation ▶ Shopping lacks big names ▶ Some very down-market stalls at the open markets
<p>Management</p> <ul style="list-style-type: none"> ▶ LSP has coordinating role ▶ City Council gives high priority to value and promotion of the heritage ▶ Voluntary sector engagement in managing heritage assets ▶ Arts and cultural organisations active in heritage-related events and festivals 	<p>Management</p> <ul style="list-style-type: none"> ▶ Respective roles of Council departments not widely understood following reorganisation
<p>Marketing</p> <ul style="list-style-type: none"> ▶ LBTB Heritage Revealed campaign ▶ Marketing staff resource within Lancaster City Council ▶ Museum Xplorer joint ticket 	<p>Marketing</p> <ul style="list-style-type: none"> ▶ Collaboration and coordination between marketing partners to promote Lancaster and its cultural heritage not fully developed ▶ No consumer perception research re heritage offer for locals or visitors ▶ Citycoastcountryside promotion serves a corporate communications purpose, not effective for visitors ▶ Online and CRM under-developed ▶ Resources scarce: only 4% of City Council marketing allocated specifically to heritage ▶ No set targets and limited evaluation of marketing activity

Opportunities	Threats
<p>LANCASTER</p> <p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ Extended visitor attraction at Castle after closure of the prison ▶ Improved presentation and interpretation of Castle Precinct ▶ Clearer strategy on investment and possible rationalisation of museums, including <ul style="list-style-type: none"> ○ Possible extension of City Museum with cafe, retail, exhibition gallery ○ Improvements at the Maritime Museum with interpretation of the Quays and story of slave-trading ○ Improvements and possible cafe/restaurant in Judges Lodgings ▶ Development of Ashton Memorial and Williamson Park 	<p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ Uncertainty over re-location of courts ▶ Use of Castle to be determined by Duchy ▶ Reduced public and local authority funding calling future priorities into doubt ▶ Uncertainties over future priorities and policies of proposed LEPs ▶ Cost and financial sustainability of museums and attractions ▶ Continuing lack of investment in museums and attractions creating negative impact
<p>Public Realm and Built Environment</p> <ul style="list-style-type: none"> ▶ Public realm and connectivity improvements – Square Routes ▶ Business Improvement District 	<p>Public Realm</p> <ul style="list-style-type: none"> ▶ Reduced public and local authority funding calling investment into doubt
<p>Amenities and experiences</p> <ul style="list-style-type: none"> ▶ Lancaster Canal corridor – new mixed development and public spaces ▶ Further boutique hotel development ▶ Profiling of the food offer through Taste Lancashire and local food promotions ▶ Festivals and events - tied into Heritage theme to help image and impact 	<p>Amenities and experiences</p> <ul style="list-style-type: none"> ▶ Market conditions restricting investment ▶ Community concern about re-development

<p>Management</p> <ul style="list-style-type: none"> ▶ Business Improvement District 	<p>Management</p> <ul style="list-style-type: none"> ▶ Uncertainty about future management of museums
<p>Marketing</p> <ul style="list-style-type: none"> ▶ Agreed and shared identity for Lancaster as heritage city ▶ Joint heritage marketing framework for all partners ▶ City Council & museums activity to extend LBTB Heritage Revealed campaign locally ▶ Website improvements with social networking presence and inspiring images ▶ Pendle Witches story (2012 anniversary) ▶ Partnership with universities marketing and research departments ▶ Cross promotion between attractions 	<p>Marketing</p> <ul style="list-style-type: none"> ▶ Joint marketing with Morecambe can confuse visitors - very different segments and messages ▶ Uncoordinated, individual promotion by partners

MORECAMBE

Strengths	Weaknesses
<p>Context</p> <ul style="list-style-type: none"> ▶ Environmental heritage of Morecambe Bay ▶ Morecambe Area Action Plan ▶ Voluntary bodies involved in heritage development & management ▶ Benefits of THI scheme 	<ul style="list-style-type: none"> ▶ Little Interpretation of heritage ▶ Insufficient cultural heritage product ready to promote effectively
<p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ Restored art deco Midland Hotel ▶ Winter Gardens? ▶ Heysham Village and Heysham Head 	<p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ Sustainable use for Winter Gardens not yet identified ▶ Little wet-weather provision ▶ Weak interpretation at Heysham Head
<p>Public Realm and Built Environment</p> <ul style="list-style-type: none"> ▶ Promenade and gardens ▶ Victorian and Edwardian character and streetscapes ▶ Public art projects including the Tern project and Eric Morecambe statue 	<p>Public Realm and Built Environment</p> <ul style="list-style-type: none"> ▶ Poor maintenance of buildings, inappropriate adaptations ▶ Run down and vacant spaces ▶ No link to Heysham Head from promenade
<p>Amenities and experiences</p> <ul style="list-style-type: none"> ▶ Midland Hotel restored 	<p>Amenities and experiences</p> <ul style="list-style-type: none"> ▶ Midland Hotel appears isolated
<p>Marketing</p> <ul style="list-style-type: none"> ▶ Included as a product champion in Coastal Contrast campaign 	<p>Marketing</p> <p>Limited heritage product ready for promotion</p>
Opportunities	Threats
<p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ Winter Gardens 	<p>Heritage attractions</p> <ul style="list-style-type: none"> ▶ Inability to match-fund HLF supported projects
<p>Public Realm and Built Environment</p> <ul style="list-style-type: none"> ▶ Townscape Heritage Initiative 2 ▶ Regeneration/ renewal of housing ▶ Further promenade gardens and art ▶ Landscape Partnership scheme for Morecambe Bay ▶ Fireworks on the Bay 	<p>Public Realm and Built Environment</p> <ul style="list-style-type: none"> ▶ Inability to match-fund HLF supported projects

Marketing	Marketing
<ul style="list-style-type: none">▶ LBTB Family Fun theme planned to promote Morecambe more prominently (currently focuses on Blackpool)▶ Value for money message for short breaks	<ul style="list-style-type: none">▶ Joint marketing activity with Lancaster City can confuse visitors - very different segments and messages

10 AIMS AND OBJECTIVES FOR LANCASTER'S CULTURAL HERITAGE

AIMS

1001. Investment in Lancaster's Cultural Heritage must take forward the aims of the overarching Sustainable Community Strategy. Those with prime relevance to this Strategy are

- ▶ *to improve the quality of life for everyone in the district through working together- recognising the value of a protected and enhanced environment to that quality of life*
- ▶ *To place- shape Lancaster City and riverside as a regionally significant visitor and shopping destination and a competitive employment destination with an outstanding waterfront.*
- ▶ *To regenerate and re-invent Morecambe as an attractive choice to live, work and visit.*

OBJECTIVES FOR LANCASTER'S HERITAGE

1002. To achieve those aims all partners in Lancaster need to work towards the following objectives:

1. To manage, care for and present Lancaster's key assets, especially its Georgian buildings and townscapes to the highest standards

Rationale: the townscape and the concentration of period buildings around the city centre are key assets; they are a core attraction for visitors and the setting for public life. To gain competitive advantage as a destination and as a place for shopping, leisure, work and study it is really important that the public realm is well-designed, maintained and cleaned, well lit at night, appropriately signed and interpreted so that it is safe and walkable and a place where people want to linger.

2. To aim for a must see-attraction– the Castle with extended access – and connect it strongly with improved heritage attractions in the city.

Rationale: none of the current attractions is of a scale and quality to generate visits to the city or to be a centre of public life. The Castle has the potential to be

the headline act on which the rest of the heritage offer can feed with appropriate promotion and marketing. With development of the Castle must come a review of the quality and sustainability of the heritage attractions as a whole.

3. To develop and enhance the amenities and experiences that visitors and locals expect to find in a modern heritage city

Rationale: a successful modern heritage city combines its heritage with complementary experiences that appeal to the contemporary market; it requires a strong leisure and hospitality offer including shopping, food and accommodation, events and cultural activities. To provide these things within a distinctive environment will require intelligently managed change and adaptation.

4. To retain and restore the character of Morecambe's urban fabric and rural hinterland as it adapts to modern needs as a place to live and to visit.

Rationale: Much of Morecambe's Victorian and later building stock is run-down or poorly presented but nonetheless provides essential character to the town and is capable of restoration and adaptation to modern needs. Morecambe has to be an attractive place to live and work if it is also to be an attractive place to visit.

5. To raise and sharpen Lancaster's profile, promoting it specifically as a modern heritage city and a university city, so that it is as least as well known as other small heritage cities

Rationale: Lancaster is scarcely on the radar at present and needs to be promoted effectively. Its defining assets are its heritage, and increasingly the University of Lancaster which has gained a positive national and international reputation.

6. To strengthen partnership working to implement the Cultural Heritage Strategy

Rationale: the public authorities, the businesses, the universities and voluntary organisations all have a stake in the success of the cultural heritage strategy. All have resources and skills which could be more effective if brought together. The Local Strategic Partnership is the key body to provide leadership and facilitation.

11 INVESTMENT OPTIONS

1101. Options for investment have been developed to give effect to the Objectives for the cultural heritage. They are shaped by the audit of heritage elements which in turn has been informed by the strategic context, documentary research, comparator study, consultation and observation. The majority of the options are primarily capital investment items but a number of revenue expenditure options are included.

Objective 1: To manage, care for and present Lancaster's key assets, especially its Georgian buildings and townscapes to the highest standards

The Square Routes project

1102. Lancaster City Council has already prepared detailed proposals to upgrade spaces within the city, tackling issues that came through strongly in consultation. The scheme, known as 'Lancaster Square Routes - revitalising historic places and routes in Lancaster City Centre',⁵⁰ states its context and objectives: *Lancaster's public spaces are intrinsic elements of the city's historic fabric. Unfortunately, few of the public spaces are of such a quality that people want to linger and use them as places for rest, recreation and social interaction.* The three areas the scheme identifies for improvement are

- ▶ The city centre historic core
- ▶ The Castle Precinct
- ▶ The open land including Vicarage Fields between the Precinct and the Quay that the scheme identifies as a potential 'city park'

A new **walking trail** would connect the city centre, city park, the Quay and all the cultural spaces in between. The schemes should address the poor signage and interpretation of the Castle Precinct and provide interpretation of the archaeological remains in the Vicarage Fields and manage the tree growth that is encroaching upon them. Consultees and the Think Tanks broadly welcomed these proposals and suggested that a route from the Roman Bathhouse back towards the city centre - across the north face of the Mitre House/car park

⁵⁰ The Square Routes scheme has been drawn up by Gillespies, the landscape consultants with financial support by the Northwest Regional Development Agency.

complex - should be considered to complete a circular route and reduce nuisance uses and the 'unvisited cul-de-sac' issue.

1103. Our assessment of the economic impact (see the following chapter and Economic Impact appendix) while acknowledging the difficulties of estimating the benefits of public realm improvements, indicates that this is the action likely to create the greatest economic benefit from increased visitor expenditure, leaving aside other benefits such as increased investor confidence. Conversely without this investment the public realm could have an increasingly negative impact on perceptions of Lancaster that would impact adversely on retail expenditure and investment and visitor numbers.

Maintenance and Cleansing of the City Centre

1104. As far as we are aware Lancaster meets its statutory requirements to sweep streets, remove rubbish, manage trees and flower beds, but consultees were critical of the standards currently achieved in the historic core of the city. If Lancaster it is to gain recognition as an outstanding heritage city and destination it has to excel in the way it maintains and presents its environment. This will mean highest standards of maintenance and no doubt some prioritisation of revenue resources.

St George's Quay

1105. While recognised as a very fine collection of Georgian buildings the area has lost much of the bustle and character of a working quay. Improvement to access from the Castle (as part of the Square Routes programme) would connect it better to the City. A project to present the Quay better might include

- ▶ An interpretation scheme to convey the sense of a working quay with all the loading and unloading, some of which might be recreated in sculpture
- ▶ Replacement of a section of the flood protection wall with a demountable barrier to allow a view of the river.
- ▶ Screening of the road on the opposite bank of the river

The feasibility and cost of these options would require study but they could make the Quay a more attractive place to visit and thereby stimulate economic activity in that area.

Dalton Square Statuary

1106. An expert condition survey should be undertaken of the listed Queen Victoria memorial. The frieze on the Town Hall opposite contains the figure of Victoria's son, King Edward VII. Both would benefit from cleaning, restoration and protection and would then complete a very attractive cluster of statuary of that period (including the War Memorial) within this area.

Objective 2: To aim for a must see-attraction– the Castle with extended access – and connect it strongly with improved heritage attractions in the city.

The Castle

1107. The operation of the Castle as a visitor attraction has been constrained by court and prison uses. There are two levels to which it could expand. Firstly if the courts move out there can be certainty about the availability and promotion of the full tour. Additional space could be used to improve the visitor reception, possibly by moving the main entrance to the south-west doorway; this would also improve visibility and facilitate coach drop-offs, provide enhanced interpretation and increase revenue generation by improving the shop and creating a café with outdoor service in good weather. Events and performances could continue and there may be potential to attract corporate and social functions. A very broad estimate of a cost of £500,000 to achieve this improvement was recently made⁵¹. In our view this would improve the visitor attraction but would not transform visitor numbers because capacity constraints of the cells and rooms would remain.

1108. At a higher level there are ambitions for the whole Castle to be released and used for visitor, leisure or other uses, to become the must-see centrepiece of Lancaster. This has the potential to move Lancaster to a higher league of destinations but there are several hurdles to negotiate. The prison will revert to the Duchy of Lancaster whose plans for it are not known. Careful study of the options and financial implications of new uses will be essential. It should not be assumed that a museum or visitor attraction use of the whole site would be financially sustainable. One can point to comparators such as Warwick Castle which offers a very popular interpretation of history (managed commercially by Merlin Entertainments) or to the mixed use scheme for the former Oxford Prison which incorporates residential apartments, restaurants, a Malmaison hotel well and an 'Oxford Castle Unlocked' visitor attraction. In any event private sector involvement and investment would appear essential to develop and sustain something on this scale. The Oxford Castle development took 10 years to bring to completion and took investment of £44m of which £34m was by the private sector.

⁵¹ Stuart Davies Associates *Feasibility study for the provision of Tourism and Heritage Services at Lancaster Castle, 2009* for Lancashire County Council

1109. Development of the Castle should be complemented by better interpretation and signage of the Castle Hill and Vicarage Fields area including the interpretation of the archaeological elements including the Roman Bathhouse.

1110. The release of the Castle or parts of it for visitor attraction use would have a significant bearing on any plans to develop the existing museums, which are considered in the following sections.

City Museum

1111. An approach to overcome the current severe lack of space would be to add a modern extension into New Street Square. It might include a cafe with open air seating in a remodelled square⁵². An extension (subject of course to planning and listed building permission) would allow insertion of a lift to the museum's upper levels. The galleries and exhibition rooms could be refurbished with more emphasis on changing exhibitions and interactive exhibits and modern display techniques. In our view this could bring the museum more into the mainstream of public life or the benefit of local people and visitors.

1112. If and when more of the Castle becomes available for visitor use there must be an option to move the historical collections to the Castle where it is assumed there would be more space and they would complement the environment.⁵³ The re-siting of the regimental museum to the Castle would seem appropriate. In that event there would be further options for the old Town Hall:

- ▶ To become a changing exhibition gallery with a central role in public life, to include meeting rooms, retail and a 'destination' cafe such as the Betty's establishments.
- ▶ Alternatively the building might be disposed of for other uses (preferably allowing public access), allowing budgets to be switched to the Castle

⁵² Changes to the exterior of the building and external areas should be integrated with the proposals for a re-modelled Market Square, an element of the Square Routes programme discussed later.

⁵³ Lancaster Medical Museum Group is seeking a venue to house its collection of historical medical artefacts and would like a site in Lancaster such as the Castle or the City Museum.

Maritime Museum

1113. The following measures and investment would improve the profile and performance of the Maritime Museum

- ▶ To relocate the cafe to the ground floor to make it available to a wider public and thus more viable
- ▶ To update its displays generally and in particular animate the story of the slave trade
- ▶ To create a covered extension to the rear of the building to shelter and incorporate the display of historic boats into the museum proper

1114. These measures would be complemented by measures outlined above to interpret or represent the hustle and bustle of the Quayside and to upgrade the paths and signage especially from the Castle via Vicarage Fields.

The Judges Lodgings

1115. Options to make more of this fine property are

- ▶ Modest investment (i.e. through the County Council with the potential support of the Heritage Lottery Fund) in the presentation, visitor facilities and garden development , and perhaps to seek private sector investment for a restaurant that could operate independently in a section of the property
- ▶ To seek an agreement with the National Trust to run the property with the current revenue subsidy used to pay for the arrangement. The advantages would be the undoubted management expertise of the National Trust and the profile achieved through the National Trust's membership and publicity channels

Questions about sustainability of the museums

1116. Questions arise, especially in current financial circumstances, whether the cluster of museums and the Castle is financially sustainable, and whether upgrading them all can be afforded. These are ultimately political and economic issues of how far the local authorities are able and willing to subsidise revenue costs and put capital into improvements, (albeit probably with match funding from elsewhere). What would be lost if one or more sites were closed? Where should priorities lie? We consider the options here in ascending order of attendance figures.

- ▶ **The Cottage Museum:** there would be loss of a very small museum and the associated educational work. Cost savings would be small and there is little or no potential to dispose of the property for another use.

- ▶ **Judges Lodgings:** the modest visitor figures do not suggest the Judges Lodgings is a big motivator of visits to Lancaster. However visitors would be denied access to a furnished property unlike other museum offerings in Lancaster. It would break the association in the visitor experience of the Judges Lodgings with the courts and prisons in the Castle. A disposal of the property could mean the dispersal of the Gillow furniture that was designed for the house which would be most unfortunate in heritage terms. However a disposal for some other uses, such as a boutique hotel (following the example of the Judges Lodgings in York) might allow the furniture to remain and public access to continue.
- ▶ **Maritime Museum:** in the event of closure the interpretation of Lancaster's sea-trading and the Quay would be lost and there is nowhere else that key part of Lancaster's history could be told so appropriately. Collections might go into storage for occasional showing elsewhere. It would undermine the value of the Quay as a visitor destination. Once again the limited visitor figures do not suggest the Museum is a major motivator of visits to Lancaster. However subject to assessment the buildings themselves might well find another use similar to those now on the Quay.
- ▶ **Castle:** consultees see the Castle as key strength and so it seems to visitors also to judge from the level of paid admissions and customer feedback. It is the one museum that generates reviews on TripAdvisor and similar sites. Closure of the tour would remove the highest profile attraction in Lancaster and not bode well for a future expansion into extended parts of the Castle.
- ▶ **City Museum:** This is the most visited museum but being free of charge may attract predominantly local and repeat visitors. If the museum simply closed, access to the city's main historic collections would be lost and they may go into storage. The position in relation to the regimental collections is not known. However if more of the Castle were released collections might go there as discussed above creating a strong case for a different use of the old Town Hall that maintains public access. It is an attractive property in a central position and subject to proper appraisal, might house a restaurant, independent small retail units, or education uses (in association with the universities perhaps).

1117. The closure of any of the museums could diminish the heritage offer. But the Castle is the most important to retain from a visitor perspective while the City Museum is the building that on the face of things would most readily find a alternative, productive use that could actually enhance the visitor's experience. Its collections are less 'place-specific' than those of the Maritime Museum or Judges Lodgings – in other words could be appropriately shown elsewhere. The current

uncertainty about the Castle's future precludes a clear analysis but once that is resolved we suggest a **feasibility study to examine the options for rationalisation of the museums service**. Its terms of reference should include value for money, how best to attract and present to visitors, impact on local people and education, what would happen to collections and what potential future productive use of the buildings there may be.

Ashton Memorial and Williamson Park

1118. Williamson Park and the Memorial are part of the recreational assets of Lancaster and a distinctive part of the cultural heritage. However to become more than a local destination the venue will need to offer a special experience as there are good parks in every part of the region. Detailed proposals were worked up in 2008 for a submission to HLF for a capital grant. They included

- ▶ A 'plaza' between the Memorial and the Palm House (to facilitate events and performances)
- ▶ Re-modelling of the reception and visitor facilities based around a restored Palm House with new cafe/ restaurant and retail
- ▶ A new purpose-built Butterfly House and wildlife and mini –zoo areas
- ▶ Education room
- ▶ Adventure play area
- ▶ Fully accessible walking and electric motobility routes around the park
- ▶ Improvements to the entrances and additional parking for cars and coaches to increase the capacity of the park as an events venue
- ▶ Passenger lift in the Ashton Memorial to the exhibition gallery level

1119. These proposals were costed at around £5m with a projected grant of c. £3.5m from the HLF and match funding from NWDA, the local authorities, English Nature, sponsorship and private sources including some private sector investment in the cafe. They were partly justified on the basis that they would attract visitors as well as locals to the site. An estimate was made that visitor numbers could rise from an estimated 150,000 to 250,000 a year. However, the bid did not proceed when the City Council gave priority for match funding support to a developing HLF scheme for the Winter Gardens in Morecambe.

1120. There are a number of doubts as to whether a scheme of this nature is realistic at the present time and whether it would move Williamson Park to a new level as a 'destination park':

- ▶ Some of the public sector match funding envisaged for example from NWDA would not now be available and local authority resources are constrained

- ▶ The modest size and sloping topography limit capacity, parking and accessibility especially as an event venue.⁵⁴
- ▶ Other parks in Lancashire and the region have animal collections and it is unclear what competitive edge the proposed presentation would have
- ▶ It was not clear whether significantly more visitors and spend could be generated to create a business case for private sector investment
- ▶ Given the demise of the former Trust company further consideration of how the management and financial risks of a redevelopment would be undertaken would be needed.

1121. While the HLF bid documents provide useful concept proposals they would now need to be reviewed in the light of changed public funding and economic circumstances to establish whether they are realistic and viable.

The Winter Gardens

1122. The nature of recent plans for restoration have been discussed in Chapter 7 above, but to this point a permanent, sustainable use of the Winter Gardens has not been identified. While the heritage significance of the building is not in doubt it is not possible to define a new investment option until the future role of the building is clear.

Objective 3: To develop and enhance the amenities and experiences that visitors and locals expect to find in a modern heritage city

Canal corridor redevelopment

1123. The *Historic Towns and Cities in England's Northwest* report suggested that development of this area could make the canal 'a connecting, rather than dividing element within the City Centre. New uses could include 'waterside apartments, hotels, restaurants and bars, adding to the City's overall offer with a Canalside entertainment quarter'.

1123. At the public inquiry in 2009 English Heritage called for a scheme '*genuinely and imaginatively exploring how existing townscape and heritage assets could be integrated into the layout*'. The Inspector concluded that '*the redevelopment of such a large brownfield site so close to the city centre is much*

⁵⁴ A comparator is Roundhay Park in Leeds which also has a Butterfly House and Tropical World, but has 1000 acres of mostly flat terrain (compared to 54 acres of land at Williamson Park)..

to be desired, and that the proposal would contribute to the sustainable economic development of the city and surrounding area'.

1124. The City Council is involved both as planning authority and as owner of land assets. It will be a major challenge to bring in a revised scheme that takes account of the heritage and other issues raised, particularly in the present economic climate. But the current blight on the area and the risks to listed and historic buildings are unfortunate. In our view it is a positive opportunity to bring the canal more into the urban fabric, improve the leisure and hospitality offer and create another area of character. There is the opportunity to strengthen the cultural 'quarter' that includes the Dukes and Grand Theatres and the Musicians Cooperative. The current position is that the City Council is working with English Heritage to try to reach agreement on the treatment of the heritage elements. Once this is done Centros will be given the opportunity to put forward a revised scheme taking account of the heritage constraints. Should that not succeed there may be need to review the development brief and seek a new developer.

Hotel accommodation

1125. City centre hotel accommodation of a high standard is a common factor in successful heritage cities. While hotel investment is lead by the private sector the City Council should encourage it and maintain its positive planning stance towards conversion of historic buildings for accommodation.

Food

1126. Several consultees told us how important good food is in rounding out a heritage destination. Lancashire has a strong heritage of traditional food and drink. The Forest of Bowland and rural Lancashire are known for excellent dairy produce, free-range beef and lamb, Goosnargh ducks, Lancashire cheese and even wild boar. The re-birth of interest in regional food and drink is celebrated and promoted by Taste Lancashire, a quality award scheme for eating establishments which deserves the backing of businesses and the City Council.⁵⁵ Independent food shops strengthen the offer. A local food festival or themed market would raise the profile of Lancaster and benefit the local supply chain and provide opportunities for joint working and cross-selling between businesses.

Festivals and Events

1127. Festivals and events are not a substitute for getting the basics of destination management right but they can raise the profile, communicate positive

⁵⁵ Taste Lancashire is co-ordinated by Lancashire and Blackpool Tourist Board and Quality in Tourism.

messages and provide the stimulus to visit now. Some years ago a Festival and Events team promoted a series of heritage events. While that pattern of direct promotion is no longer feasible or desirable, in our view, there are opportunities for the City Council to support and facilitate events generated by local enthusiasm and run by not for profit organisations. With universities and a college, substantial arts and cultural organisations, bars and pubs that promote music and a retail sector that would benefit from events and animation, Lancaster is very well placed to generate new events and perhaps to become known as a **festival city** in the way that Cheltenham, Salisbury or Chester are. One can see opportunities – for example a canal festival or other niche music festivals. Business representatives have indicated in consultation a readiness to contribute towards event activity, possibly through a Business Improvement District (BID) vehicle. Private sector traders could lead a festival of local food and drink. It may therefore be timely for the City Council to bring interested parties together and define the opportunities and ambitions by developing a **festivals strategy** for Lancaster.

Objective 4: To retain and restore the character of Morecambe’s urban fabric and rural hinterland as it adapts to modern needs as a place to live and to visit.

Morecambe Townscape Heritage Initiative (THI)

1128. The THI approach remains relevant and valuable in Morecambe where interesting buildings and streetscapes are in many cases marred by inappropriate repairs, fascias and adaptations or are undermined by a lack of maintenance. An application was made to the Heritage Lottery Fund (HLF) for a second THI scheme targeted around the western end of the Marine Road Central area, to support renovation of the Victorian and Art Deco buildings, complemented by quality improvement to streetscapes. The scheme received an HLF award of £923,000 matched by £325,000 from Lancaster City Council. Subject to HLF approval the project will commence in 2011-12. The renovation and care of the townscape is exactly in line with the research on the economic importance of heritage, and contributes directly to the objective of making Morecambe an attractive place to live.

Landscape Heritage Partnership, Morecambe Bay

1129. Morecambe Bay Partnership is leading an application to the HLF for a Landscape Partnership Scheme (LPS) for part of the Morecambe Bay coastal and inter-tidal areas. The aim of an LPS is to support local communities to restore and enhance their natural and built environment, provide training opportunities in relevant skills, encourage community participation and improve access and understanding. It can enhance the appeal of an area as a place to visit. The proposal covers 196 sq. km in the Morecambe Bay Partnership area. There would be a series of projects with a mix of capital and revenue spend. Among

them is a 'Places and Spaces' project to provide interpretation and create visitor facilities, such as rest places, viewing platforms and play spaces. It will aim to create a 'brand' for Morecambe Bay to strengthen its identity and sense of place. In the development stage, work will prioritise the visitor potential of the key sites. Building on this, community consultation, field visits and design workshops will identify the essence of the place, leading to commissioning and design of the facilities. Key sites being considered include Arnside, Silverdale, Warton Crag, Red Bank, Morecambe Lodge, Hest Bank, Morecambe, Lancaster Maritime Museum and St. George's Quay, Heysham Head, Sunderland Point, Glasson, and Cockersands.

1130. The application to HLF for a project development grant has been made in early 2011 to prepare a bid for a project delivery grant; if successful the project will be implemented between 2013 and 2018. The HLF can provide up to 75% of eligible costs but will require an element of match funding; the project is looking to each local authority (including Lancaster City) to contribute £5000 over a 5 year period.

Objective 5: To raise and sharpen Lancaster's profile, promoting it specifically as a modern heritage city and a university city, so that it is as least as well known as other small heritage cities

Marketing recommendations

1130. The recommendations for marketing Lancaster's cultural heritage are as follows:

- ▶ Development of an externally-focussed brand guideline document for Lancaster as a heritage city.⁵⁶ LBTB is well equipped to assist in this task, as an extension of the guidelines for heritage promotion they already produce. Guidelines for Lancaster's Cultural Heritage should include key messages and themes, target markets, tone of voice, image, identity and logo.

⁵⁶ Externally- focused means appropriate to communications to external visitors and customers, and giving specific heritage emphasis to Lancaster's heritage, complementing the more corporate focus of the citycoastandcountryside brand identity.

- ▶ Lancaster City Council to work with LBTB to extend the Heritage Revealed campaign, rather than having a separate Lore & Legends campaign. This could mean integrating Heritage Revealed marketing activity into Lancaster City websites, including data capture, social networks and online ticketing.
- ▶ Refreshing of the City's website section on Lancaster's heritage including a separate Lancaster City web address (URL) so it stands alone (but can still be reached from the citycoastcountryside website). In detail we suggest the following remedial actions:
 - ▶ Introduce a list of featured events and offers and allow 'time hooks' on the homepage for people who have specific travel dates and would be convinced by timely events and activities that this is the break for them.
 - ▶ During holiday periods provide a focussed theme and feature family activities, things to do and places to stay. Autumn ought to kick in with the perfect time to celebrate Halloween in Lancaster, followed by a Christmas splash promotion.
 - ▶ The audioguides could be developed into video guides which can be used on YouTube and Facebook etc. Smartphone apps could be developed as mobile guidebooks to the city and its attractions.
 - ▶ These smartphone apps could draw on the archaeological database of Lancaster compiled by English Heritage.
 - ▶ Introduce more inspiring images and review header text
 - ▶ Introduce social media
 - ▶ Introduce visitor feedback – recommendations of things to see and do, reviews of accommodation, visitor photos & testimonials
 - ▶ Introduce customer data gathering mechanisms – competitions, e-newsletters
 - ▶ Introduce a food and drink section - food highlights, itineraries for foodies.
 - ▶ Cross promote – from attractions link to relevant accommodation, food and other things to do.
- ▶ As budgets for promotion are small the majority of marketing activity must be focussed through partnership working (i.e. with LBTB) and online, rather than through printed materials.

Images

1131. Professional and inspiring imagery (and film footage) play a key role in promoting destinations. Several organisations use images of the heritage in printed and online materials including the City Council, LBTB, tourism businesses, the Storey Centre, the Dukes & Grand Theatres, Lancaster University, and the Chamber. An shared image library specifically for promoting heritage would be a valuable asset. An image brief could be included in the suggested brand

guidelines. It is recommended to start by commissioning a set of 10 to 12 strong heritage images that could be used by all partners and added to over time, budget permitting.

Promotion to residents, businesses and students

1132. The credibility of external communications requires that the people who live, work and study in the destination understand and confirm the message. They can become the ambassadors for the heritage city concept – or will undermine it if they do not buy into it. The City Council can explain and promote the concept of ‘heritage on your doorstep’ to residents and businesses through corporate communications. The University of Lancaster understands the student market very well and produces targeted information and promotional materials. There could be significant opportunities for joint promotions between the City Council and the Universities marketing departments.

Customer Relationship Management

1132. Ultimately a Customer Relationship Management system can be set up to deliver specific and relevant information such as cultural heritage offers tailored to targeted segments. The first stage in developing an effective consumer database and CRM is to pull all customer data into one place, cleanse and profile it, which means to gather further information about each record including customers’ interests.

Product Data

1133. Up to date product data is needed to keep the website current and useful to visitors. That requires engagement and communications with businesses and operators but there is no dedicated business development role within Lancaster City Council. If resource could be allocated to development there would be better collaboration with business and tourism partners and improved product presence via the Destination Management System on the websites.

Research

1134. A significant untapped opportunity exists for partnership work between the universities and Lancaster City Council, especially regarding research into perceptions and markets for Lancaster and its heritage.

Objective 6: To strengthen partnership working to implement the Cultural Heritage Strategy

1135. The issues of management and coordination of partners’ support for the cultural heritage have been discussed in Chapter 8, above. Mostly they relate to

ways of working and do not require specific investment. However there are revenue resource implications of the following:

- ▶ The possible development of a **Business Improvement District** would require a resource from the City Council to manage the process. to reach the point of a ballot
- ▶ Continuing support for and possible expansion of the **festivals and events programme** in partnership with the voluntary and arts sector would have implications for local authority (City Council and County Council) revenue
- ▶ Ongoing support for **voluntary sector organisations** managing heritage assets will make a modest call on revenue
- ▶ Revisions to **management arrangements or service levels at the museums** could materially affect revenue budgets

12 OUR APPROACH TO ASSESSING ECONOMIC IMPACT

1201. We do not think that it is possible to put a numeric value on a place's heritage. Instead we think it is more beneficial to consider the impact of **using heritage assets more effectively** in support of economic or social objectives.

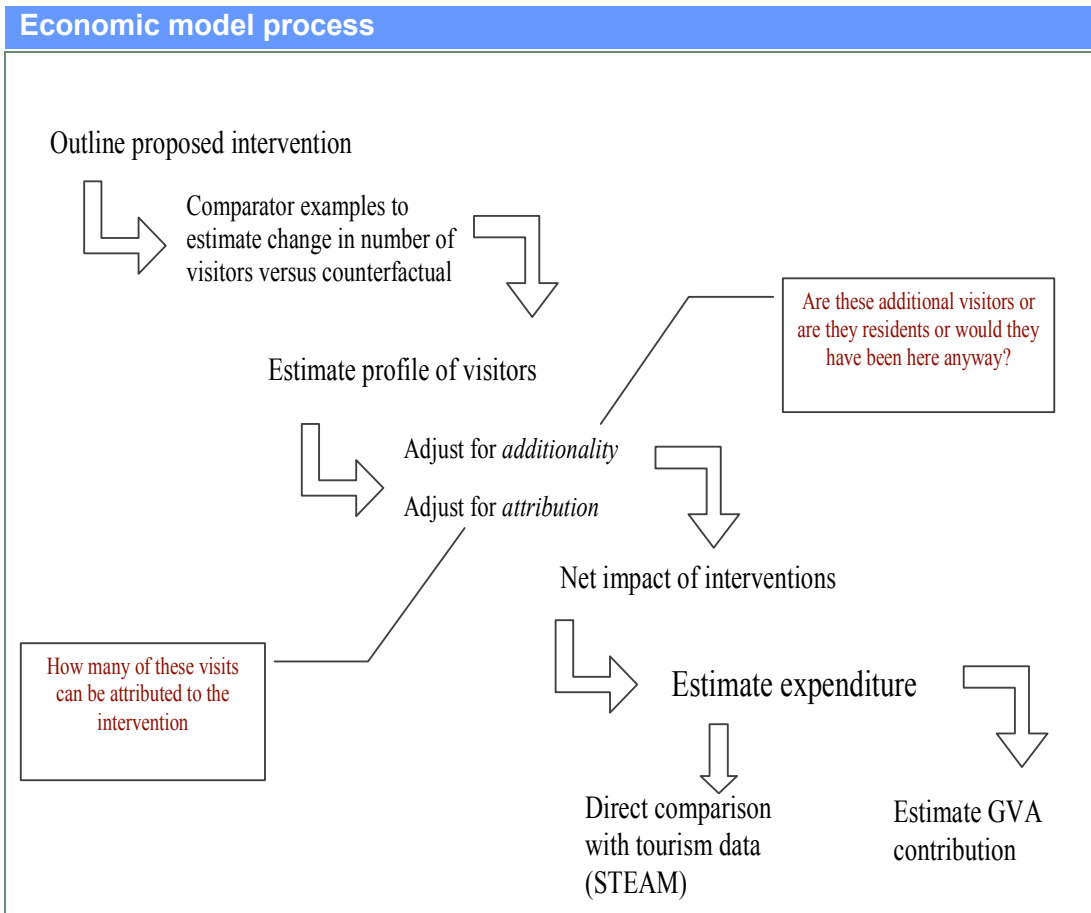
1202. The purpose of the economic impact assessment is to consider what the specific activities proposed within this strategy could mean in *economic* terms. This is quantified by using measures such as Gross Value Added (GVA) and employment, although there are other important effects that it is not possible to quantify.

1203. At the outset it is useful to consider some of the ways in which heritage can impact on the economy. The main routes are through:

- ▶ Attracting visitors
- ▶ Attracting investment
- ▶ Increasing property and land values
- ▶ Enhancing image and attracting and retaining students.

Whilst recognising the contribution of the latter three, we have focused the model on attracting visitors as this is a more direct outcome to be achieved from enhancing heritage assets.

1204. The below diagram depicts the model developed to assess the impact of each of the proposed interventions:



Source: SQW

1205. The following section explains how the economic impact for specific enhancements has been calculated and then summarises the overall impact. Detailed workings are provided in Appendix 3.

Multipliers

1206. For each of the proposed actions we estimate the number of additional visitors and their expenditure. We have based this on our understanding of the impact of similar actions elsewhere. The model also makes an adjustment to allow for a multiplier effect – that is the additional benefits that accrue to the supply chain (spend in local shops etc) as a result of more visitors.

Gross Value Added

1207. Gross Value Added (GVA) represents the additional wages, salaries and profit that are generated through business activity. Expenditure, which is often quoted, does not accurately reflect the economic benefit to an area because it includes a large proportion which is simply paying for goods and services that have been bought in. For example, expenditure (turnover) at a supermarket is high but its value added (the profit and wages which actually benefit the area) is

relatively low. Most of the expenditure in this case is used to buy in the goods from other areas.

1208. GVA is therefore usually a more accurate measure of the economic contribution that investments make. We have used ratios from research carried out by Cardiff Business School⁵⁷ for the English regions. This study gives ratios of turnover to GVA and employment for tourism-related businesses in each of the English regions.

Job creation

1209. For any given amount of GVA, a certain number of jobs can be assumed. Therefore the final step in the calculations was to estimate the number of jobs that could be created by the enhancements.

Return on Investment

1210. The return on investment indicates the ratio of benefits to costs of an intervention. At this stage it is possible to provide an “indicative” assessment of these costs, and to quantify the benefits in terms of the additional tourism GVA that could be generated. The results therefore reflect the potential impact of the projects on tourist expenditure rather than quality of life for residents or impact on property values. Even so it helps to understand the type of increase in tourism that is required to justify investment in visitor attractions. Where the GVA created exceeds the costs of an investment it represents a positive return.

Bringing the assessments together

1211. Once each of the impacts has been estimated, we present the overall expenditure and GVA estimates for one year and 10 years. The overall estimate of economic impact is then reduced by 25% to reflect the likelihood that some of the impacts will overlap. For example, some of the visitors to the festivals and events may stay at the suggested hotel accommodation or be included in the additional visits to the Castle.

1212. All the actions will work together and the estimates assume that these are also supported through the marketing recommendations made in the report.

- ▶ At this stage, these figures can only provide an indication of the scale of impacts that could be achieved, or would make reasonable targets for the types of actions set out in the report.

⁵⁷ *Tourism Satellite Account – First Steps – English Regions, 2005, Cardiff Business School*

- ▶ As the details of any of these actions are refined, it will become easier to be more specific about the potential impacts. Each of the themes could be developed in a number of different ways and this will affect the impact.
- ▶ Even so, the analysis does help to put in perspective the scale of impacts that could be achieved and helps identify, from an economic perspective, the value for money that different propositions might have.
- ▶ We have assumed for simplicity that these impacts start immediately and continue at the same level for ten years. With more detail it would be possible to model how these might be expected to grow or decline over time.
- ▶ The public realm estimates in particular are only indicative. There is no good evidence of the impact that this type of work has on visitor numbers. It is also the project which has the potential for the greatest impact on residents.

1213. Finally and most importantly, these figures are based on estimates of additional visitor numbers. As discussed earlier, this is only one of a number of ways in which heritage can contribute to the economy. For example:

- ▶ **Inward investment** is more likely in attractive environments where heritage is well presented. Securing one or two significant new investments could easily produce the level of economic benefit estimated in relation to tourism.
- ▶ **Residents:** the improvements would improve the quality of life and civic pride, contribute to property values and generally make Lancaster a better place to live. That could help to generate a positive regeneration spiral, attracting and retaining people and investment
- ▶ **Students and the university:** the university and its students are major assets. The look and feel of a place is very important to students and their decisions on where to live after graduating. Lancaster could strengthen these links and make more of these opportunities. From an economic perspective a pool of graduates is a huge attractor for investment and in stimulating new business and innovation. Heritage can play a part in creating the right environment.

OVERALL ASSESSMENT OF IMPACT

1214. The following table provides a summary of the impacts in terms of expenditure, GVA, potential employment and the return on investment that could be created. (Monetary values are kept in current (2010) prices throughout - they exclude inflation).

	10 yr additional tourism expenditure £m	10 yr additional GVA £m	Jobs created FTEs for 10 years (FTE years)	Return on investment (GVA: costs)
Public realm improvements	£19.2	£7.1	35 (350)	1:1 10 year pay back of investment
Castle improvements	£8.8	£3.3	16 (160)	1:1 Breakeven after 10 years including castle public realm spend 6:1 return based on investment of £500,000
City Museum Development & Extension	£6.6	£2.4	12 (120)	1.2:1 Slightly better than breakeven after 10 years based on £2 million investment
Events and arts programmes	£6.6	£2.4	12 (120)	12:1 Assumes costs of just £200,000 over 10 years
Ashton Memorial/Williamson Park	£3.3	£1.2	6 (60)	1:0.24 Breakeven would take 40 years based on £5 million investment
Hotel accommodation	£3.9	£1.5	7 (70)	No public costs identified
Total	£48.4	£17.9	87 (810)	(excluding Ashton monument and low investment for castle) 1.8:1 Better than breakeven after 10 years
Total adjusted by 25%	£36.34	£13.4	66 (610)	1.4:1 Breakeven after 10 years (excluding Ashton monument)

UNQUANTIFIED ITEMS

1215. **Morecambe Townscape Heritage Initiative Phase 2** has not been quantified as we have limited relevant information on the scheme (see section 13 below). In addition, it focuses on supporting the commercial viability of retail premises which, whilst having a clear economic impact, is not a direct result of enhancing the area's heritage.

1216. **Morecambe Bay Landscape Partnership scheme** plans to develop an integrated spatial plan for the area, increasing local participation, volunteering and training. It is likely to create substantial environmental, social and community benefit, but we do not consider it will have significant economic impact, in the short to medium term. Together with other improvements it will contribute to improving the image and profile of Morecambe but it is not possible to separate this out and place an economic value on it.

1217 **Maintenance and cleansing of public realm, Lancaster** is a basic requirement and will not provide economic impact over and above the improved public realm impact identified above. However, failure to maintain the public realm is likely to have a negative economic impact.

1218. There are a number of **other initiatives covered within the plan** that would require more detail and planning in order to develop economic impact assessments:

- ▶ Better, coordinated marketing: this is assumed in all of our calculations.
- ▶ The facilitation of a Business Improvement District is a mechanism for raising funds and its impact would depend on what it is used to support
- ▶ Canal corridor redevelopment would have a major impact on the retail sector and potentially also on the visitor market. It would require a separate impact assessment when a scheme is detailed
- ▶ Encouragement of new City Centre hotels: accommodation provision will develop partly as a result of demand to visit and stay in the city. Impacts can be calculated for specific hotel plans as they come forward.
- ▶ Regeneration of Victorian and Edwardian housing, Morecambe: together with other improvements such as the Townscape Heritage Initiative, this is likely to have an economic impact through improving the image and profile of Morecambe. However the main short and medium term benefit will be focused on social and community impacts.

13 TEN YEAR INVESTMENT FRAMEWORK

BASIS OF PRIORITISATION

1301. We have evaluated actions and investment options by both their impact and their feasibility.

Impact does not have a single measure. It can be

- ▶ **Economic benefit** deriving both from the impact of tourism and the influence of heritage on choice of place to live, work and invest.
- ▶ **Quality of life benefit**, in itself a broad concept which may include sense of place, community cohesion and individual satisfaction through understanding and appreciation.
- ▶ **Intrinsic value** of preservation and enhancement of the environment (as stated by the Community Strategy).

Feasibility also has several aspects to be weighed:

- ▶ **Financial** cost and other resources such as land and buildings
- ▶ **The constraints on funding**, from public, private sector and grant sources and the likelihood that resources can be accessed.
- ▶ **Control**: the extent to which the public sector can direct and drive investment. Where the public sector owns or manages the heritage attractions and the public realm it is clearly 'in charge', but where development options require greater private sector or partnership inputs the public sector's role will be more as facilitator.
- ▶ **Risks**: the likelihood and severity of impact of risks to partners and resources, which can include risks to reputation and partnership, and may include political, legal, planning, site and commercial risks, as well as risks of displacing existing activity and economic benefit.

Assessments of investment Options

Public realm improvements

1302. The impact of this type of investment on visitor numbers is difficult to assess. Lancaster City generated around £82 million in visitor revenue in 2008. Improving the public realm would certainly contribute to these numbers, either by increasing them or at least maintaining them. As an estimate we suggest that the improvements could contribute an additional 2% on the current total, or £1.6 million each year.

1303. Research shows that there are other ways in which a high quality public space can contribute to the economy. A 'safe, clean and green' residential environment can attract a highly skilled workforce, families and employees, boosting property values and changing the socio-economic structure of a neighbourhood. For businesses, especially the retail sector, 'safe, clean, green' often means low insurance costs, a stable and prosperous local consumer market, and an attractive environment for employees to work in. Investors in both the residential and the commercial property market may be drawn to quality environments.

1304. The economic impact of public realm is likely to be highest when closest to the economic centre of the locality, to the major attractions and opportunities to spend. So we would prioritise the Square Routes scheme improvements in the city centre, followed by the Castle Precinct and finally the 'city park' area between the Castle and the Quay.

1305. The cost of the public realm work is estimated to be £5.35 million for capital works in the city centre including the Market Square and £2.42 million for the Castle Precinct. In addition, there is a further £100k for maintenance (this is a notional figure to indicate the need for higher standards of upkeep and maintenance after the capital work – equating to £1 million over 10 years in current prices). The total investment would be around £9 million.

Castle improvements

1306. If the improvements are limited to those possible when the courts relocate, a target of increasing numbers by perhaps 40,000 to around 80,000, depending on the way the Castle can be configured, would be reasonable. We have assumed that 25% of these visitors come to Lancaster specifically to see the Castle on a mixture of day trips and overnight stays. STEAM data estimates average expenditure per visitor to be £60. Using these figures, the additional revenue that could be attracted would be £600,000 a year.

1307. Should the whole Castle be released for visitor and public uses the economic impact would be considerably higher; but the development is too hypothetical at this point to estimate visitor numbers.

1308. In addition there is intrinsic value in the Castle as the dominant historic building. A process of restoration and adaptation would make that value more accessible to visitors and residents.

Museum reconfiguration

1309. Museums and other attractions can expect to generate additional visitors from re-development. The actual impact will depend on how the museums are configured, marketed and what they contain, but we would expect this type of improvement generally to increase visitor numbers by perhaps 50% or around 30,000. This is an addition to the numbers achieved currently and would take the total to around 90,000. These would be reasonable targets for museums of this scale.

The analysis assumes that 25% of these additional visitors are from outside Lancaster which would generate expenditure of £450,000 a year.

In addition the museums, especially the City Museum, could become more much more central to public life, creating a significant social and cultural benefit.

Ashton Memorial/Williamson Park

1314. Estimates are that the venue attracts 150,000 or more persons a year. Most are local users rather than tourists. The venue does however offer some potential for hosting events and attracting passing visitors. Its potential to generate additional visitors is probably weaker than the Castle's, so estimates of the potential number of *new visits* to Lancaster will be smaller, perhaps in the range of 30,000 a year. Assuming again that 20% are from outside the city, this would mean 6000 day trips, implying additional annual expenditure of £360,000.

Events and arts programmes

1315. To have a significant economic effect, events and festivals must be of a scale to attract interest outside the district and ideally the region. Comparisons with similar cities in the UK suggest specific events or programmes of cultural activity could attract attendances of around 40,000. Assuming good, high profile marketing, perhaps 25% of these visitors would come from outside Lancaster and 10% from outside the North West. That would mean that 4,000 people would be from outside the City. Most would visit on day trips, but those from outside the region (10%) could be assumed to stay overnight. With average expenditure of £27 per person for day trips and for a two day trip, £120 for staying visitors (per person per trip), this would generate additional expenditure of £480,000 to £640,000 each year of the programme.

1316. Events can also provide profile for a place, providing a platform for positive messages. There is a large body of evidence to support the positive impact that a successful events programme can have on a town or city. Events relating to heritage can have a strong educational benefit. Young people who feel involved with or have a strong connection to their local area are less likely to become involved in anti-social behaviour. An events programme can create opportunities for local young people to volunteer which can have positive benefits for their future employment chances.

City centre boutique hotel

1317. The strategy recognises that there is no current excess demand for hotel accommodation in Lancaster, but that boutique hotels of high standard can attract visitors who might otherwise not have considered a trip to Lancaster. That effect has been seen at the Midland Hotel in Morecambe. An estimate of additional expenditure generated directly by an additional hotel with say 25 beds in 10 rooms is £260,000 a year.

1318. For residents and students this may create more employment opportunities. The likelihood of residents recommending the area to friends/family for a weekend break/ short stay may increase. If visitors opt to stay in the area rather than visit for the day they will spend more in the local economy, not just on the hotel but at restaurants and bars etc and may also be tempted to visit attractions the next day. For investors, knowing a place has good quality accommodation for business visitors is important. Hotels with conferencing facilities may also be a draw.

Morecambe Townscape Heritage Initiative 2

Investment by the Heritage Lottery Fund through the THI programme is not intended to generate visitors (as some of the other proposed heritage projects here are) but to contribute to the sustainability, vitality and confidence of the community concerned.

Evaluation of THI programmes has focused on four areas:

- Quality of Life Enhancement
- Townscape Improvements
- Economic Regeneration
- Image and Confidence Building

Work undertaken by Oxford Brookes University demonstrates a range of impacts on these factors using interviews with residents, observations and secondary data, to award scores. Across all the projects it covers it estimated that there was a 6% increase in the scores associated with quality of life for residents, an

average increase of 5% in perceptions of townscape improvement and in economic regeneration and 2% in image and confidence building.

These scores indicate general movement in a positive direction. We would expect investment in THI in Morecambe to produce similarly positive results on quality of life, townscape etc., helping to attract new residents and potentially more visitors. But the aim of the investment would principally be to improve the quality of life for residents and the scores do not provide a basis for valuing economic contribution through additional expenditure and GVA.

Marketing

1319. The economic impact of changes in marketing is not estimated separately. It is assumed that marketing will be a necessary part of an investment programme and undertaken in order to achieve the targets for the other actions. There appears, however, to be a very broad scope and need to improve the image and awareness of Lancaster.

SUMMARY ASSESSMENT OF INVESTMENT OPTIONS

The options are assessed on scales of 1-5 for impact (low to high impact) and 1-5 for feasibility (hard to achieve to readily achievable). So for example a high impact option that would be hard to achieve would be assessed 5:1

Option	Impact	Feasibility	Assessment Scale 1- 5
Lancaster			
Public Realm Improvements – Square Routes project Objective 1	Potential high economic impact by encouraging footfall and linger time in city centre, and through increased investor confidence	Technical studies undertaken; 1 st phase planned for 2011-12; Some cost and match funding issues may remain to be resolved	5:3
Maintenance of public realm Objective 1	Will contribute to quality of life through better environment	Will require prioritisation of cleansing and maintenance budgets; BID may assist	3:4
Sculpture Restoration Objective 1	Conservation of features of intrinsic merit (Grade 2*) and enhancement of the environment	Funding required but HLF grant a possibility	2:3
Improvements to Maritime Museum and Quay Objective 1,2	May stimulate more visitors and economic activity at the Quay, starting from a low base. Attractions out of centre will need to work harder to attract footfall to be sustainable.	Significant cost; HLF grant a possibility; museum constrained by space	2:2
Castle as major attraction – courts and prison relocated Objective 2	Potentially major increase in tourism numbers and profile and hence economic impact. Must-see visitor attraction gives target market reason to visit, potentially staying longer.	Future of courts and former prison not in local control - buildings owned by Duchy; scale of investment and mix of uses requires feasibility assessment	5:2
Castle attraction improved on relocation of courts Objective 2	Some economic impact through tourism volume (but less than for full Castle attraction development)	Depends on relocation of courts and funding – HLF grant a possibility	4:3

Extension/ remodelling of City Museum Objectives 2,3	Some economic impact through tourism volume. Quality of life benefit by bringing museum into centre of public life; Modernisation of heritage assets in a contemporary style has consumer appeal	Planning constraints with listed building; capital funding needed; HLF grant a possibility.	3:3
Improvements to Judges Lodgings/ possible restaurant Objectives 2,3	Fuller use e.g. restaurant could community benefit and generate some additional visitors. Quality contemporary food offer in heritage setting would appeal to target segments	Investment not a priority for County Council. Possibly could attract private sector funding	2:3
Ashton Memorial and Williamson Park developments Objective 2	Only a major scheme would generate economic benefit from external visitors; but a quality of environment benefit for residents	High cost for major scheme (£5m+ probably); Potential HLF grant but match funding has proved difficult	2:2
Canal Corridor development Objective 3	Potential major economic benefit by extended retail and leisure offer; improved environment and quality of life from successful scheme. Provides robust retail offer to complete 'whole day out' or short break offer.	Dependent on private sector funding in tough market conditions. Council land assets are involved.	5:2
City Centre Boutique Hotel accommodation	Can enhance city appeal to up-market staying visitors	Private sector investment and market-led; responsive to growth in visitor market.	4:2

Festivals and Events Strategy Objectives 3,6	Successful events can have economic impact – festivals provide profile and a distinct reason to visit -.and community benefit from participation Helps to form sense of place for residents & businesses.	Initiatives likely to come from third sector with support from local authorities and private sector: BID may assist	3:3
Better, coordinated marketing Objective 5	Potential for significant improvement of tourism volume and profile of the city. Lancaster Heritage City brand and information provision must be stronger.	Needs realignment of current resources through partnership; will be a challenge to increase resource to more effective level	4:3
Facilitation of a Business Improvement District initiative	If successful would generate an income stream for better management/ maintenance/ promotion of the city	Proposal needs to be defined in conjunction with private sector businesses and process of ballot facilitated	3:4
Feasibility study to examine the options for rationalisation of the museums service and buildings	Aim to make best use of museums buildings in context of possible future availability of the Castle for visitor and heritage uses.	Requires cooperation of several stakeholders – including Duchy, Courts Service, County and City Councils.	4.4

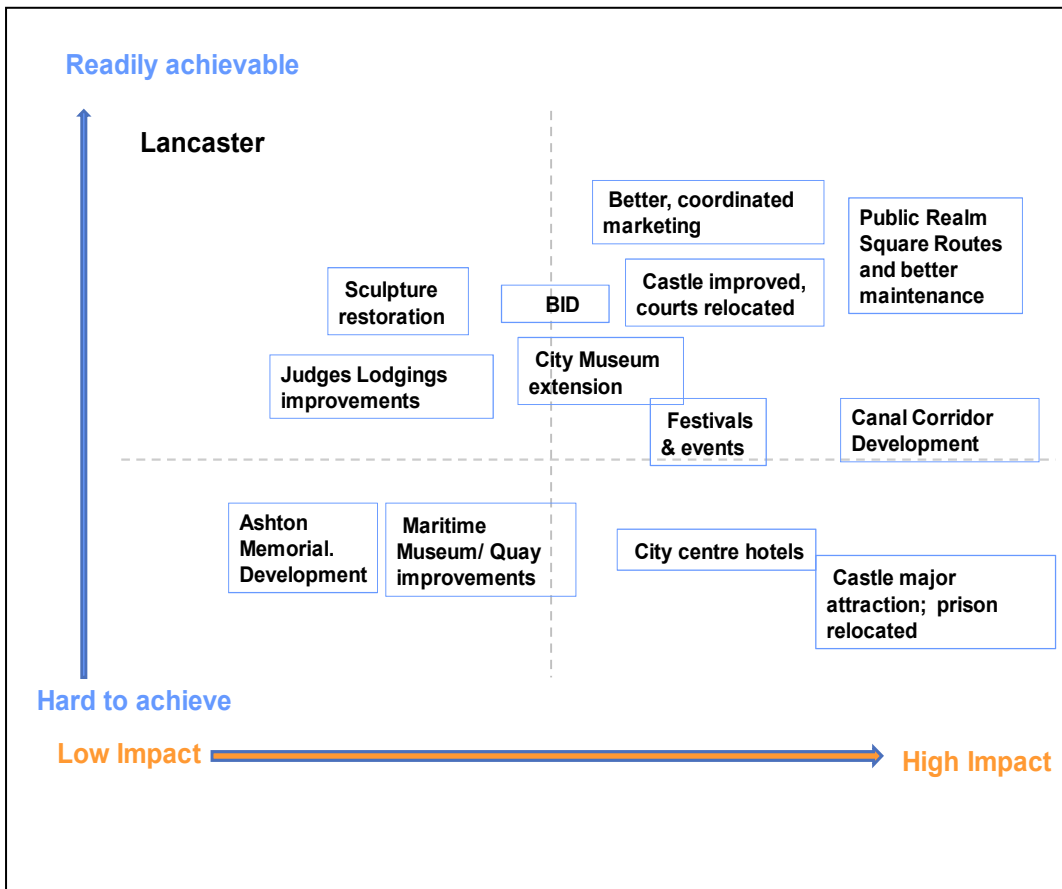
Option	Impact	Feasibility	Assessment Scale 1-5
Morecambe			
Townscape Heritage Initiative 2 Objective 4	Impact would be primarily on quality of life, townscape, regeneration, image and confidence. Economic impacts through attracting and retaining key workers.	Technical feasibility and scope established, HLF grant offered and match funding from Lancaster City Council identified. Property owners' cooperation and input required	4: 3
Landscape Partnership scheme (HLF) Objective 4	Community benefit by volunteering and training opportunities; improved environment. Longer term benefit to tourism through improved access, interpretation, profile.	Potential HLF funding. Requires match funding and strong partnership working around Morecambe Bay	3:4
Regeneration/ renewal of Victorian and Edwardian housing Objective 4	Economic benefit by attracting key workers, and quality of life – key strategic aims	Through Homes and Communities Agency and City Council's Housing Capital Programme.	4:2
Winter Gardens restoration Objective 3, 4	An added attraction and venue attracting economic benefit through additional visitors and lengthened stays; scale of impact will depend on configuration and uses. Intrinsic value in restored Grade II* building.	Credible Business Plan not yet emerged and match funding has not been available	4:1

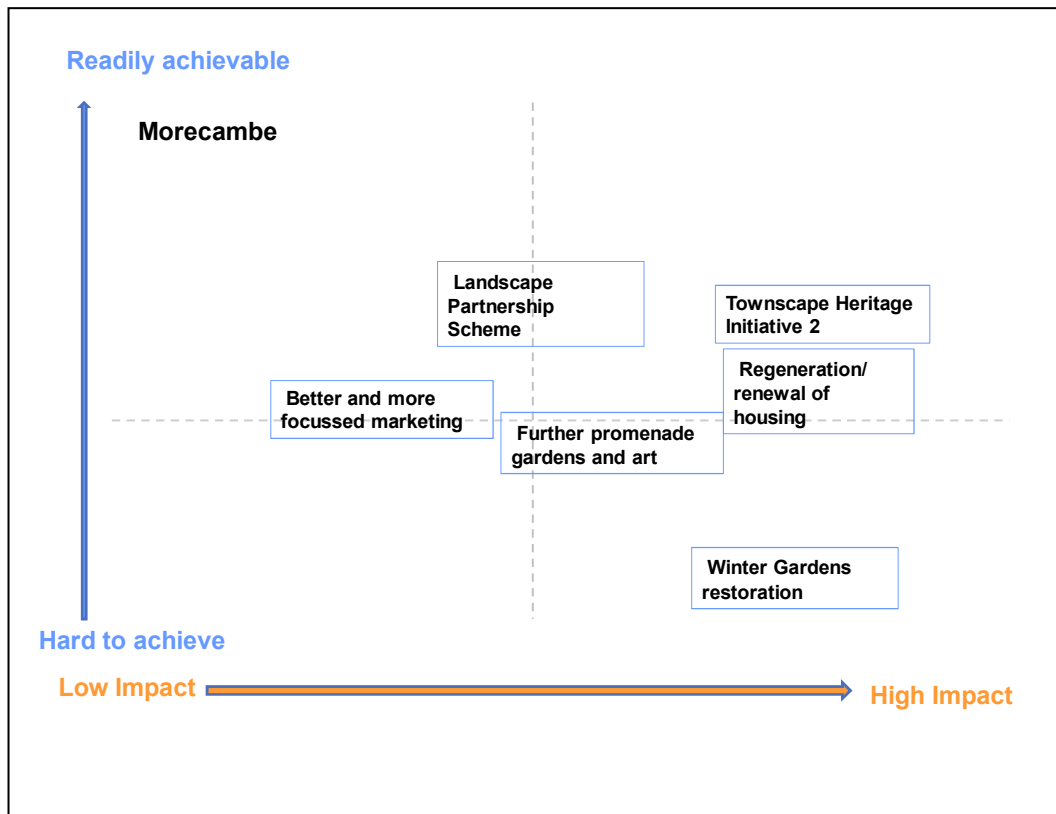
Further Promenade gardens and art works Objective 4	Some tourism impact and quality of life through better environment	Funding channels uncertain/ limited by public sector stringencies.	3:2
Focussed marketing Objective 5	Limited cultural heritage ready to market (other than Midland hotel); cultural heritage not prime interest of key market segments - continue focus on family market and seaside fun	Cost constraints but closer partnership working between City and LBTB possible	2:3

VISUAL SUMMARIES

1302. The matrices that follow are a visual representation of the options assessment. The matrices originated in the Think Tank on the heritage 'product' of Lancaster district, which identified development options and assessed them for impact and feasibility. We have refined them by further assessment against the stated criteria.

1303. **Options in the top right quadrant are those with higher impact and reasonable or better feasibility, and are therefore most likely to be priorities for investment.** However those in the lower right quadrant have high potential impact and merit moving forward if obstacles can be overcome.





INVESTMENT FRAMEWORK

1304. The investment items have been placed in three categories as follows.

- ▶ **Priority 1:** items with the greatest benefit and impact, with reasonable or better feasibility
- ▶ **Priority 2:** items with substantial benefit and impact, but which appear difficult to move forward at present
- ▶ **Priority 3:** desirable items whose benefit is less or where feasibility is low at present.

1305. It is important that investment in fabric and programmes goes hand in hand with **focussed marketing and promotion**. So in the table below there is commentary on the recommended marketing approach. .

Note: In the table LCC is Lancaster City Council while County Council is Lancashire County Council.

PRIORITY 1 CAPITAL PROJECTS	Commentary, Constraints & Marketing Approach	Notional cost	Lead Body	Possible funding Sources
Public realm – Square Routes	<p>Comprehensive public realm remodelling Will require greater long-term maintenance input. City Centre the first priority</p> <p>Brand communications for Lancaster Heritage City via strong images of streetscape and spaces – mix of contemporary & heritage. Development of new guided and self-guided trails.</p>	<p>Capital works: 2010 Q2 prices £5.35m for city centre, £2.42m for Castle Precinct.</p>	LCC	<p>City Council Capital programme 2011-12 includes £220,000; £73400 secured from S.106</p>
Lancaster Castle –improvements and better access on relocation of courts	<p>Investment requires relocation of courts and lease re-negotiation.</p> <p>Increased access enables increased promotional activities. Need to develop & promote stories and activities in and around the castle.</p>	<p>£500,000 notional estimate</p>	County Council	HLF
Morecambe Townscape Heritage Initiative Phase 2	<p>Repair and renovation of heritage buildings and improvement to the townscape</p> <p>Lancaster City Council public & corporate communications: conserving the past and creating better quality of life.</p>	<p>£923k from HLF; £275K from City Council for the core fund; private sector to contribute to works.</p>	LCC	HLF, LCC private sector,

<p>Feasibility of City Museum Extension and re-modelling</p>	<p>To create improved exhibition space, cafe and retail; contingent on future of Castle.</p> <p>Development and promotion of events and activities. Will create cross-promotional opportunities. Mix of contemporary & heritage important.</p>	<p>£2m notional capital project estimate. Feasibility funds to be sourced from LCC</p>	<p>LCC</p>	<p>HLF, LCC</p>
<p>Morecambe Bay Landscape Partnership scheme</p>	<p>Conserving natural and built heritage features and fostering community participation and learning</p> <p>Lancaster City Council public & corporate communications: creating better quality of life.</p>	<p>£2.7m estimate</p>	<p>Morecambe Bay Partnership</p>	<p>Morecambe Bay Partnership including local authorities, HLF</p>

PRIORITY 1 REVENUE PROJECTS	Commentary, constraints & Marketing Approach	Notional Cost	Lead Body	Possible funding sources
Maintenance of public realm, Lancaster	<p>Highest standard cleaning and maintenance of city centre public realm.</p> <p>Will help brand communications via strong images,</p>	£100k (reprioritised budgets)	LCC	Realignment of budgets; BID
Better, coordinated marketing	<p>Clear and cost-effective communication of Lancaster as modern heritage city to targeted consumer markets</p> <p>Clear brand guidelines, focus on online promotion with partnership approach.</p>	Web/ CRM/ images/ research £50k; annual budget £50k	LCC	A partnership approach: universities, LBTB and private sector
Festivals and events development	<p>Raise the profile of Lancaster and create economic benefit through a fuller programme of events and festivals – relating to arts, culture, heritage, food etc</p> <p>Festivals provide a distinct reason to visit – must be promoted & publicised with other essential information: food, accommodation, shops and parking</p>	<p>£25k from partners and external funding for consultancy to create a festivals development strategy.</p> <p>£20k+ a year from City Council to support 3rd sector festival development and lever external funding.</p>	Lancaster Arts Partners, voluntary sector, private sector traders – depending on nature of the events	Voluntary sector, private sector (including BID), Arts Council England

<p>Facilitation of a Business Improvement District initiative</p>	<p>Requires a successful ballot and income spent as agreed by business community</p> <p>Opportunities for businesses to align with City brand via joint promotions.</p>	<p>£40k to take forward the initiative to point of ballot</p>	<p>LCC</p>	<p>LCC, private sector</p>
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PRIORITY 2 CAPITAL PROJECTS	Commentary, Constraints & Marketing Commentary	Notional Cost to public sector	Lead Body	Possible funding sources
Castle as a major attraction, on relocation of courts and prison	Transformational project; requires feasibility and options appraisal Major national media interest. Increased potential of short stay market.	£10m ⁵⁸ (as an element of a mixed scheme with private sector investment)	County Council	Duchy, private sector, HLF
Canal Corridor development	Strengthening of the retail, leisure and residential offer in the city; regeneration of blighted area Local and regional media interest.	Private sector investment	LCC	Private sector
City Centre hotels	Further strengthen hospitality offer Cross promote with food and attractions.	Private sector investment	LCC as planning authority	Private sector
Regeneration/renewal of Victorian and Edwardian housing, Morecambe	Adaptation to modern needs; scale of intervention to be scoped	£1m+ Costs will depend on scale of intervention	LCC	Homes and Communities Agency and City Council's capital programme.
Further Promenade gardens and artworks	Continuation of programme to create outstanding promenade Local PR, downloadable artwork trail and include new images. Scale of intervention to be scoped.	£1m+ Costs will depend on scale of intervention	LCC	HLF

⁵⁸ This can only be a notional figure as no scoping of the potential development has been done. The £10m figure reflects the public sector contribution to the £44m development of Oxford Castle.

PRIORITY 3 CAPITAL PROJECTS	Commentary/ constraints	Notional Cost to public sector	Lead Body	Possible funding sources
Sculpture Restoration	Dalton Square and Town hall Local PR, downloadable sculpture trail and include new images.	Cost to be assessed by specialist report	LCC	LCC, HLF
Judges Lodgings improvements	If restaurant development this would attract foodie media interest.	Cost to be assessed	County Council	Private sector County Council
Ashton Memorial and Williamson Park Developments	Major development scheme; Business Plan and Return on investment would need to be established. Regional media interest. Online, local and regional promotion.	£5.2m (based on HLF scheme prepared 2008 plus inflation)	LCC	LCC, private sector, HLF
Maritime Museum and Quay	Re-siting cafe and refreshment of exhibitions, animation and interpretation of the Quay Local media interest. Cross-promotion essential to achieve footfall.	Interpretation study c. £25,000. Capital cost to be assessed	LCC	
Winter Gardens Restoration	Must establish purpose, operations and Business Plan	£12m – based on scheme prepared for grant applications 2009	Trust	Trust, LCC, HLF

14 ACTION PLAN

1401. An Action Plan for the years 2011-2015 has been prepared to show how the Strategy recommendations can be carried forward. It is published as an accompanying document.

APPENDICES

APPENDIX 1

MEMBERS OF THE STEERING GROUP AND CONSULTEES

Steering Group Members

Andrew	Backhouse	Heritage Tourism Executive	NWDA
Rachel	Dyer	Tourism and Marketing Officer	Lancaster City Council
Gill	Haigh	Communications Manager	Lancaster City Council
David	Lawson	Forward Planning Manager	Lancaster City Council
Andrew	Leeming	Senior Regeneration Officer	Lancashire County Council Lancashire and Blackpool TB
Justina	Ma	Policy and Strategy Manager Regeneration Projects Support Officer	Lancaster City Council
Esther	Monck	Head of Cultural Services to 31 Mar 2010	Lancaster City Council
David	Owen	Planning Asst	Lancaster City Council
Sarah	Robinson	Principal Regeneration Officer	Lancaster City Council
Paul	Rogers	Head of Econ Development and Tourism to 31 March 2010	Lancaster City Council
Peter	Sandford	Museums Manager North	Lancashire County Council
Paul	Thompson		

Consultees

Evelyn	Archer	Councillor and Morecambe Winter Gardens Trust	Lancaster City Council
Tim	Bell	General Manager	Lancaster House Hotel Morecambe Bay Partnership
Susannah	Bleakley	Partnership Manager	Lancaster University
Terry	Bray	Overseas Programme Officer	
Nick	Brooks-		
Nick	Sykes	Head of Tourism	NWDA
Roger	Carter	Chairman	Bay Tourism Association
Jim	Catterall	Vice-Chairman	Bay Tourism Association
Stephen	Gardiner	Senior Conservation Officer	Lancaster City Council
Amanda	Hutchinson	Manager	LM Vision Board
David	Lewis	Associate Director	Centros
Steve	Lloyd	Head of Cultural Services (acting)	Lancashire County Council
Alex	McCroskie	Marketing Director	Cumbria Tourism
Heather	McManus	Corporate Director, Regeneration	Lancaster City Council

Mark	McTigue	Tourism Marketing Officer	Lancaster City Council
John	Miller	Chief Executive	Heritage Trust for the North West
Ann	Morris	Chief Executive	Lancaster District Chamber of Commerce
Gerry	North	Manager	St. Nicholas Shopping Centre
Katherine	O'Connor	Tourism Programmes Manager	NWDA
Tony	Openshaw	Marketing Director	Lancashire and Blackpool TB
Steve	Partington	Director of Business Development	Lancashire and Blackpool TB
Mark	Prada	MD	Graphic Design
Jon	Price	MD	LAServe
Darren	Ratcliffe	Historic Areas Advisor	English Heritage
Patrick	Sheridan	Asst Director for Development	Urban Splash
Matt	Stanaway	General Manager	Midland Hotel Morecambe
Rachel	Stott	Cycling Officer	Lancaster City Council
Joe	Sumsion	Chief Executive	Dukes Theatre
Jim	Trotman	Tourism Manager to 31 March 2010	Lancaster City Council
Jane	Watson	NW Communications Officer	National Trust
Lois	Willis	Board Member/ Representative	Storey Creative Industries/ Lancaster LSP Economy Group
Oliver	Wilson-Fish	Chair	Lancaster Central Retail Group

APPENDIX 2

COMPARATOR CITIES

Three heritage cities are profiled here.

- ▶ Bath is a 'premier league' heritage city and destination, chosen for comparison because the *Historic Towns and Cities in England's Northwest* report suggests Lancaster might be the 'Bath of the North'.
- ▶ Chester is the leading example of a heritage city in the North West, is relatively successful and aspires to be in the premier league
- ▶ Carlisle, like Lancaster, is a compact city with great heritage interest, which has not gained the recognition it would like.

Bath - three centuries as a visitor destination

Bath attracts a million staying visitors a year and is one of the small number of 'top heritage brands' in the UK, along with places like Edinburgh, York and Oxford that have an established national and international reputation. It has been a visitor destination since Roman times and in its 18th century heyday the gentry came to take the waters and enjoy polite society entertainments. It has a large stock of quality city-centre hotels.

Tourism is heavily concentrated in the city centre, and consists mainly of day or overnight visits to its attractions and the central retail area. Bath has invested heavily in its major attractions including development of the Roman Baths and the Spa. Bath has a strong programme of cultural events and festivals run by a charitable company with support from the Council, Arts Council and commercial interests.

In 2010 a new self-guided City Trail was published which explains why Bath is a World Heritage Site. Copies are distributed free to visitors via hotels while a World Heritage Walking Trail was produced and funded by the World Heritage Enhancement Fund. This promotes walking above vehicle travel and has the potential to encourage visits to less well visited parts of the site.

Bath has concerns about the pressures of tourism especially for events such as the Christmas Market where coach day trip tours bring visitors for a stay of only a few hours limiting the economic impact. There are concerns too about maintenance and cleanliness and perception of gradual decline of public realm and adverse impact of road traffic. A Public Realm and Movement Strategy is at draft stage, but aims to make Bath the UK's 'most walkable city'.

Like Lancaster, Bath has many specialist independent shops (40% of retail outlets), but they are mixed with outlets for larger chains. Its historic core contains many small listed buildings that cannot be altered or enlarged which has made it difficult to attract

multiples into some parts of the city. However, the new Southgate Centre will expand the retail offer substantially. Because of the types of tourists the city attracts, the independent retail sector works well and gives Bath a distinctive offer considered to be an attraction in its own right (although there will be a threat to some businesses from the new Centre). Shire's Yard, for example, is an independently run small specialist shopping centre which opened in 1989 and comprises 20 individual stores and attracts 100,000 visitors a week during the summer. There are parallels here with the smaller scale independent retail profile of Lancaster, and the Bath example demonstrates that with the right visitors, the independent retail offer can thrive.

Bath has been a World Heritage Site since 1987. It is currently preparing a city-centre Business Development District subject to a vote by businesses.

Chester - history with shopping

The city has an international reputation as a tourist destination but is also a major retail centre. The strong retail within a heritage environment attracts tourists, day visitors from the rest of Cheshire, the Wirral and much of North East Wales.

Chester's historic environment is one of its key assets. It has a strong history back to Roman times and from the medieval era to the 18th century it was the most important city in the Northwest. Moreover, with the River Dee navigable up to Chester and strong trade links with Ireland, it was the principal port for the south of the region. However the attractiveness of its built environment is in part because of late 19th century architectural additions 'enhancing' the medieval character of the central streets including the Rows. In its centre it has one of the few five star hotels in the North West and other city centre hotels.

The Rows remain a famous tourist attraction. They are predominantly occupied by retail, cafes and restaurants. They are a mix of Tudor through to Victorian styles and consist of buildings with shops or dwellings on the lowest two storeys. A high proportion of Chester's visitors are attracted by the shopping offer. But it also offers historic walls, an attractive river frontage and cathedral.

It does not have an outstanding museum offer but it has recently excavated and presented its Roman amphitheatre. It has a substantial programme of improvement relating to its historic environment (although recent reductions in funding will no doubt impact on these plans). There is a multi-million-pound proposal for a new cathedral entrance and visitor centre and the "Cathedral Quarter" project has identified the potential to create a new square in the heart of the city. Public realm improvements around Castle Drive are proposed using high quality natural surface treatments and there are proposals for Town Hall refurbishment and repairs.

Chester has a popular racecourse and claims that its cultural festivals generate £16 million a year of additional expenditure by visitors. Its festivals are managed by an arms-length company with support from the City, Arts Council and businesses. The

performing arts and museums offer is, however, quite weak.

Chester has a strong reputation as a heritage city and the retail offer (supported by custom from wider around the region) adds to its appeal. This brings trade and has led to further investment in cafes and restaurants. It is the combination of heritage, environment and the supporting services that give Chester its appeal.

Carlisle - overlooked medieval masterpiece

Carlisle has a strong heritage with a wide range of high quality heritage assets. The oldest and best known is Hadrian's Wall, an asset which the city has been working hard to develop as a more significant tourist attraction. Carlisle's biggest individual tourist attraction is the Tullie House Museum & Art Gallery with around a quarter of a million visitors a year. Its splendid Cathedral dates from the 12th century. The Castle is managed by English Heritage and receives around 53,000 visitors, but like Lancaster's is severed from the city centre by the inner relief road.

Despite this range of heritage attractions the North West Regional Intelligence Unit (2007) reports that the city does not gain the attention it should as a visitor destination – rather like Lancaster

There are a number of important planned developments to strengthen the heritage offer, though the squeeze on public funding may curtail progress. Major investment was announced for the Tullie House Museum to support the creation of a new Roman Gallery that will use interactive technology to recreate life in Roman Carlisle and along the Wall. Public realm works have been proposed to improve the link between Hadrian's Wall and the historic centre of Carlisle; they will include orientation hubs at key junctions, way-markers, information boards, bespoke seating and public art. They also intend the Old Town Hall to play a more prominent role. Public realm works will see wider pavements, new artist-designed seating which aim to create a better pedestrian environment and to draw visitors and shoppers into the area. A major part of the project is traffic management and parking, as in most other heritage cities.

Coupled with the physical investment are programmes of events. The Carlisle Fireshow attracts around 35,000 and Welcoming the Light is expected to draw at least 7,000 people into the city centre for one evening in March.

APPENDIX 3

ECONOMIC IMPACT ASSESSMENT

OUR APPROACH

Our view is that the value of heritage is not simply related to tourist attractions or recorded by the number of people that work in the sector. Heritage gives a place its character; it is at the heart of a place and is at least as important for residents as it is for visitors, investors and students.

We do not think that it is possible to put a numeric value on a place's heritage. Instead we think it is more beneficial to consider the impact of using heritage assets more effectively in support of economic or social objectives.

The Heritage Strategy presented in the main report makes a number of recommendations about how Lancaster and Morecambe's heritage can be presented, developed and/or used more effectively for the benefit of the people who live and work there.

The purpose of this paper provides more detail on what the implementation of these recommendations could mean in *economic* terms. This is usually quantified by using measures such as Gross Value Added (GVA) and employment, although there are other important effects that it is not possible to quantify.

At the outset it is useful to consider some of the ways in which heritage can impact on the economy. The main routes are through:

- ▶ Attracting visitors
- ▶ Attracting investment
- ▶ Increasing property and land values
- ▶ Enhancing image and attracting and retaining students.

The following section provides some examples of the evidence for the way in which improved public realm work in particular can impact on the economy. We have considered public realm in detail for two reasons. First, because of its importance in supporting the quality of built heritage, and second, because it is

generally a more challenging area in which to assess impact compared with, say, improvements to a specific attraction.

ATTRACTING VISITORS/INCREASING TOURISM

Tourism depends heavily on the environment; indeed good quality spaces can become destinations in their own right. Cleanliness, safety, ease of movement, and the distinctiveness and 'authenticity' of natural and cultural features are often the driving force behind a visitor's choice of destination. Visitor surveys⁵⁹ consistently show that Edinburgh's impressive natural setting and built environment are the main aspects which draw people to the city. All visitors will interact with the public realm and therefore it contributes at a disproportionately high level to the overall image of the city or town.

Coventry⁶⁰ is cited as an example where urban design improvements including streetscape, signage and a civic square have increased footfall by 25% on Saturdays. It achieved this through improved pedestrianisation, a new civic square, clearer signage and better placement of street furniture, the introduction of CCTV and radio security schemes has made the city centre a much safer place to be. As a result, footfall in the town centre has risen by 25% on Saturdays, benefiting local trade, as a result of improving the city centre and making the place feel safer.

Consumers and tourists now have much higher demands and expectations and will subsequently seek a high quality environment in which to spend their leisure time⁶¹ (shopping, eating out etc). Therefore, urban areas need to provide an appealing offer in order to successfully compete for customers (residents, businesses, visitors) and subsequently contribute to economic growth.

High quality public realm contributes towards a location's attractiveness to visitors and as most visitors are likely to be on foot or public transport, the quality of the streetscape is critical. However, the sector is particularly sensitive to

⁵⁹ City of Edinburgh Council, Public Realm Strategy, 2009 , available at http://www.edinburgh.gov.uk/internet/Attachments/Internet/Environment/Planning_and_buildings/Planning_hidden/Planning_policies/Supplementary_planning_guidance/Urban_Design/Public_Realm_Strategy_part1.pdf

⁶⁰ Macmillan, S. (2003) *Designing Better Buildings - Quality and Value In The Built Environment*, Spon Press

⁶¹ The Value of Public Space: How High Quality Parks and Public Spaces Create Economic, Social and Environmental Value, 2004, CABE Space

perceived changes in a location's attractiveness so the public realm must be kept well maintained.

Derry City

A major public realm improvement scheme valued at £8m is being programmed for the City Centre's two major public spaces Guildhall Square and Waterloo Place. Derry City Council is animating the public realm through its programme of monthly speciality street markets. **This investment is contributing to increases in hotel occupancy rates, performance of visitor attractions and increased retail/leisure and commercial activity within the City.**

Source: <http://www.derrycity.gov.uk/economicdevelopment/tourism.asp>

Plymouth – Armada Way

Armada Way is a key axis of movement through Plymouth. It provides a direct link from the transport hub of the railway station to the waterfront and also to Central Park, making it a vital artery in terms of pedestrian flows through the city and also as a means of attracting customers to the wide range of shops and businesses that flank the street.

The public realm improvements that have been implemented have helped to create a more legible city centre, promoting easy access for pedestrians, and a safer, more pleasant streetscape that is more conducive to attracting customers. The development of the new public square has attracted a number of markets, such as **Christmas and food markets**, with associated increases in the number of visitors to the city centre. The square also hosts **a regular farmers market which proves to be extremely popular amongst businesses and consumers. This event attracts 120 stalls and an estimated 100,000 people over 3 days.** In all, approximately 75 market days are hosted throughout the year. It is anticipated that the next stage of the development, which will include a landscaped area and pavilion, should promote more street activity and an alternative space for cultural events and performances.

Source: The Economic Impact of the Public Realm, ECOTEC, 2007,
<http://www.emda.org.uk/uploaddocuments/EconomicImpactofThePublicRealm-FinalReport.pdf>

INWARD INVESTMENT

Investment in the public realm will have a positive impact on inward investment and can act as a catalyst for regeneration⁶². Surveys of business leaders

⁶² Public Perception of Glasgow City Centre After Public Realm Improvements , Glasgow City Centre Partnership, 2001 and City of Edinburgh Council, Public Realm Strategy, 2009 , available at http://www.edinburgh.gov.uk/internet/Attachments/Internet/Environment/Planning_and_buildings/Planning_hidden/Planning_policies/Supplementary_planning_guidance/Urban_Design/Public_Realm_Strategy_part1.pdf

confirmed that environmental and place quality were one of the key reasons for relocation - it provides the right perception of a prosperous and cared for environment. The transformation of the redundant eighteenth century Royal Dockyard in Chatham⁶³, as well as drawing in almost two million visitors, has helped attract 100 businesses employing over 1,000 people and had a positive impact on the local economy as a whole estimated at £20m a year.

Other research⁶⁴ suggests that such investment can have a positive impact on perceptions of the area, especially non-local ones and stimulate the local economy and generate above average private sector returns.

Booth⁶⁵ concluded that there is a clear relationship between the public realm and economic performance. As an example, she highlighted that the quality of the public realm has been an integral part of the regeneration strategy in St Helen's. In particular, it has played a key role in attracting inward investment to the locale and increasing footfall in the town centre. This research also notes that a high quality public realm has a fundamental role to play in ensuring that regeneration projects are sustainable in the long term.

It is our view that the economic impact of public realm is likely to be highest where the improvements are closest to the economic centre of the locality and in close proximity to major attractions as this will attract visitors to stay longer, and spend more in the area.

The following example demonstrates how heritage investment in the public realm can attract new businesses and inward investment.

⁶³ Heritage Lottery Fund New Life: Heritage and Regeneration (2004)

⁶⁴ The link between quality of place and economic performance, 2004, Frontier Economics.

⁶⁵ Link between LEQ and Economic Improvement, 2005, Anne Booth

http://www.keepbritaintidy.org/ImgLibrary/The%20Link%20Between%20Local%20Environmental%20Quality%20and%20Economic%20Improvement_600.pdf

Evesham Market Town – Worcestershire

Evesham has undertaken a plethora of environmental improvements as part of the recent Market Towns Programme– the riverside and town centre regeneration package has involved substantial improvements to the town's gateways, riverside, parks and high street, in addition to the development of brownfield land and other sites for open space and recreation. The rationale for prioritising the environment was the need to attract investment. Port Street, an area of the town that experienced a 20% vacancy rate at the beginning of the programme, now boasts some 95% of trading businesses. The County Valuation Office reports that yield continues to indicate increasing confidence by investors – four new units have been developed with accommodation above and at least five premises have been completely refitted. The town's parks have achieved 'Green Flag' status and the riverside regeneration programme now offers regionally and nationally acclaimed riverside festivals attracting visitors to the town.

Source: Evesham Market Town Partnership Evaluation Report 2001/2006: Meeting the Challenge, 2006, Evesham Market Town Programme

INCREASING LAND AND PROPERTY VALUES

CABE⁶⁶ describes how a high quality public realm can have a positive impact on property prices. It cites examples such as Emmen, Appeldoorn and Leiden in the Netherlands where property prices have been measured in terms of their relationship with parks and neighbouring waterways. In some cases, increases reached 11%. Even play areas and trees can help to increase land values. Berlin demonstrated a rise of 17% from tree planting in an area in 2000, and New York's Union Square stimulated private housing investment in 1985 and helped to stabilise adjacent commercial properties. Similar conclusions have been drawn from research in both the Netherlands⁶⁸ and the United States.

The survey showed that, on average, pedestrians were willing to pay more for better streets. Local residents were willing to pay more council tax, public transport users would accept higher fares and people living in rented homes were happy to pay increased rents to improve the quality of their high streets.

ENHANCING IMAGE

Public realm investments can have a strong signalling effect to a number of audiences (locals, non-locals, investors) especially in terms of the image of an

⁶⁶ The Value of Public Space: How High Quality Parks and Public Spaces Create Economic, Social and Environmental Value, 2004, CABE Space

area. A good example of this is Portrush Town Hall⁶⁷. The town hall which was erected in the late 1800's was restored in 2006 at a total cost of £1.3m. The reported impacts of the building regeneration were many:

- ▶ From an image reflecting the decline of the town it has become a symbol of regeneration. The most visible building in the town has now been restored to a high standard. This combined with other developments is helping to increase confidence.
- ▶ While the work is not responsible for a restoration of economic fortunes in the area it has visibly contributed to this impression. The owner of the listed station opposite is now actively considering refurbishment and nearby shops report an increase in trade which has also lengthened due to evening activities in the hall.
- ▶ Tourism numbers have not increased as a direct result of the refurbishment but they have increased since its completion.

For Lancaster, there is clearly scope to make more of the heritage assets in enhancing the city's image. Although the impacts are not easily measurable, there is sufficient anecdotal evidence that this type of improvement can change perceptions and lead to the economic benefits discussed throughout this paper.

ASSESSMENT OF IMPACTS IN LANCASTER

In the following paragraphs we assess in some detail the potential impacts of a number of options for investment and activity.

1. CULTURAL EVENTS AND FESTIVALS

Events most obviously have a direct impact by attracting more visitors to a town, city or region. They can also provide an increased profile for a place, providing a platform to raise awareness and communicate positive messages about it. This in turn can help retain and attract residents and investment.

There is a large body of evidence to support the positive and revitalising impact that a successful events programme can have on a town or city. Research⁶⁸

⁶⁷ Northern Ireland Environment Agency Case Study available at http://www.ni-environment.gov.uk/socio-economic_impact_of_heritage_environment-4.pdf

suggests there is no doubt that events have major effects on local economies both directly and indirectly. It is widely acknowledged that the spending by visitors on local goods and services by event-tourists has a direct economic impact on local businesses that also pass the benefits more widely across the economy and the community.

Carlisle Renaissance

The Renaissance team ensured local buy-in to these events through marketing aimed at fuelling civic pride as well as inspiring visitor interest (Love Carlisle) and through carrying out a 'cultural conversations event' that allowed the local community to be part of the decision making process on what events would best promote their city. The city has focussed on delivering world class events. This summer they include the transformation of the centre into an outdoor theatre for two nights for a spectacular re-enactment of the sinking of the Titanic and the Carlisle Heritage Story at the castle.

The Chester festival in 2008⁶⁹ is another example which included; food & drink events, literature, summer music and mystery plays. This attracted 39,600 visitors in total of which 23% of the visitors were from outside Chester and visited directly because of the event.

There are also examples of events programmes that offer a wide range of other benefits:

- ▶ **Civic pride, interest and engagement with local area and culture** - a varied calendar of events creates opportunities for local people to get involved with their community either through participation or attendance and helps foster community spirit.
- ▶ **Social and Educational Benefits** - events, particularly around Lancaster's heritage can have a strong educational benefit and can help young children to engage with their area's history. There is also a body of evidence to suggest that young people who feel involved with or have a strong connection to their local area are less likely to become involved in anti-social behaviour. An events programme can also create opportunities for local young people to volunteer which can have positive benefits for their future

⁶⁸ Impact of Festivals & Events on Cultural Tourism – Raj (2003), LSA Publication, No. 93

⁶⁹ Chester Festivals 2008 (2009) – economic impact study by AAM

employment chances and gives them an early chance to learn and develop employment skills.

- ▶ **Student and Local Resident Cohesion** - events create opportunities for students and residents of all ages to mix. The annual York carnival run by the University but with significant local involvement and sponsored by several local partners is a great example of students and locals coming together to have a good time, raise money for charity and boost the local economy – both groups take a pride in the local city and successful events can help capture this. Arts based events gives groups and individuals a stage to demonstrate their talents also allow students and locals to showcase their talents
- ▶ **Increased press coverage** - for existing and potential inward investors, large events can get Lancaster much needed press coverage. Be it in tourism news or local, or national press this appeals to sponsors and those with a stake in the area as it can often give them an opportunity to highlight their offer
- ▶ **A chance to change perceptions** - in a recent NWDA study of perceptions of the North West as a place to do business, 20% of those living in the region considered Lancaster to be an asset for the region⁷⁰, this perception – and the perception from further afield can be increased through successful events

Potential impacts of events

Whilst Lancaster would focus on creating its own unique offer there is no reason why it cannot produce events of a similar nature or scale. If this is to have a significant economic effect it must be of a scale that will attract interest outside the district and ideally the region. Specific events or programmes of cultural activity could attract attendances of around 40,000.

Adjusting for additionality, and assuming good, high profile marketing perhaps 25% of these visitors would come from outside Lancaster and 10% from outside the North West.

In Lancaster this would mean that 4,000 people would be from outside the City. Most would visit on day trips, but those from outside the region (10%) could be assumed to stay overnight. With average expenditure of £27 per person for day

⁷⁰ IPSOS Mori/SQW Consulting – “Perceptions of the North West” – NWDA, 2009.

trips (see Table 1.2) and assuming that two days can be attributed for every overnight visitor (e.g. £120 per trip based on STEAM data), this gives additional expenditure of £549,000 each year of the Programme. Applying a multiplier effect this would generate £658,000 of output a year.

To provide estimates of GVA and employment we have used ratios from the tourism satellite account work carried out by Cardiff Business School for the English regions. This study indicates that GVA in tourism businesses in the north west is 37% of turnover (or tourism expenditure) and that GVA of £20,522 supports one job.

The summary table shows the implications of applying multiplier effects and estimates GVA and employment. GVA over ten years would be £2.4 million which would support 12 FTE jobs (or 120 job years). With investment of £200,000 this gives a return on investment of 12.2:1.

Table 0-1: Events and arts

Measure	Value
Total expenditure/direct output	£ 549,000
Multiplier	1.20
Total net output	£ 658,800
10 year output (£ millions)	£ 6.6
Output to GVA ratio	37%
GVA estimate	£ 243,756
10 year GVA estimate (£ millions)	£ 2.4
FTE jobs	12
Estimated costs	£ 0.2
Ratio of GVA to costs	12.2

Source: SQW estimates. All values in current (2010) prices

2. IMPROVED ACCOMMODATION OFFER (BOUTIQUE HOTEL)

The strategy recognises that there is not currently an excess demand for hotel accommodation in Lancaster report, but that a boutique hotel could, in itself, attract visitors who might not otherwise have considered a trip to Lancaster. As it stands the choice of quality accommodation is rather limited. The Midland in Morecambe has been renovated to luxury standards but within Lancaster city there are only a handful of hotels.

Towns and cities that are successful short break destinations and have similar heritage offers include Chester and Stratford upon Avon and both have a range of hotels and guest houses with prices and standards varying but of a high quality. Whilst this recommendation would largely be private sector led, the council can help facilitate this by supporting proposals for hotel developments and giving planning permission on the conversion of existing historic buildings. The benefits an improved accommodation offer could bring about are illustrated in Table 0-2.

Table 0-2: Benefits of an improved accommodation offer

Likely benefits

For residents and students this may create **more employment opportunities**

The likelihood of residents **recommending the area to friends/family** for a weekend break/ short stay may increase.

More of the families of students visiting from other parts of the UK or abroad may **stay within the city rather than opting to stay further afield**, in Manchester for example.

if visitors opt to stay in the area rather than just visiting for the day they will **spend more in the local economy**, not just on the hotel but at restaurants and bars etc and may also be tempted to visit other attractions the next day.

A better choice of hotels may also lead more visitors to **stop off and stay in Lancaster** on the way to other destinations on their way North or South – for example to Scotland or the Lake District.

For investors, knowing that a place had good quality accommodation for **people visiting on business** is important. Hotels with conferencing facilities may also be a draw.

Similarly, a high quality visitor accommodation points presents a **better overall package** of a destination and its aspirations for economic growth.

Source: SQW

Potential impacts

The potential impact of these actions will depend on the way in which this is promoted. We have assumed that a boutique hotel could offer perhaps 25 beds (in perhaps 10 rooms). Bed occupancy is typically around 60% (room occupancy is usually higher). This would generate 5,475 nights. Assuming that half of these visits are specifically *because* of the hotel (rather than simply staying there instead of another hotel in the city), this would generate an additional 2,738 nights each year. Visitor expenditure for those using boutique hotels is higher than average, perhaps £120 a night per person. This would generate £328,500 a year. Over 10 years this would lead to additional output, after including the multiplier effects of £3.9 million.

As above, we assumed that GVA is 37% of turnover (or tourism expenditure) and that GVA of £20,522 supports one job. The summary table shows the

implications of applying multiplier effects and estimates GVA and employment. GVA over ten years would be £1.5 million which would support 7 FTE jobs (or 70 job years). With no estimated public sector investment there is no return on investment figure.

Table 0-3: Hotel accommodation

Measure	Value
Net additional expenditure/direct output	£328,500
Multiplier	1.20
Total net output	£394,200
10 year output (£ millions)	£3.9
Output to GVA ratio	37%
GVA estimate	£145,854
10 year GVA estimate (£ millions)	£1.5
Net FTE jobs	7
Estimated costs	-
Ratio of GVA to costs	-

Source: SQW estimates. All values in current (2010) prices

3. PUBLIC REALM IMPROVEMENTS

This covers quite a wide range of proposed actions. The main ones are:

- ▶ Georgian Gem – public realm works including lighting to main squares, streets alley ways e.g. Frances Passage, Bashful Alley, Slip Inn Lane
- ▶ Castle Precinct – public realm associated with Castle and Priory
- ▶ New public park - combining Vicarage Fields with the adjacent sports ground to connect the Castle and Priory with St. George's Quay – with visitor centre, cafe and allotments
- ▶ Improved maintenance and cleanliness in city centre
- ▶ De-tune the A6 road through the town and give pedestrians priority at key points ; paving at junctions with pedestrian streets to calm traffic and give pedestrians priority

Research shows that there are a number of ways in which a high quality public space can contribute to the economy of a town, city or region.⁷¹ Tourists and shoppers may cluster around an attractive city centre, bringing revenue. A 'safe, clean and green' residential environment can attract a highly skilled workforce, families and employees, boosting property values and changing the socio-economic structure of a neighbourhood. For businesses, especially the retail sector, 'safe, clean, green' often means low insurance costs, a stable and prosperous local consumer market, and an attractive environment for employees to work in.

Investors may be drawn to quality environments – both to the residential property market, if it demonstrates stability and attractiveness; and to the commercial property market, to meet the demands of local and in-moving business. Further to these direct economic benefits, a pleasant local environment may increase civic pride. It may encourage a stable housing market, long term community development, and trust between communities and service providers. Though the evidence in this area is less well researched, **it is very possible that these less tangible benefits may in the long run contribute to socio-economic well being and long term indicators of economic health such as participation in education, employment and income.**

Potential impacts

It is very difficult to make any assessment of the contribution that this type of work could make to the number of visitors. Lancaster itself generated around £82 million in visitor revenue in 2008. Of this approximately £49 million is from staying visitors and £33 million from day trips. Improving the public realm would certainly contribute to improving these numbers. As an estimate we suggest that the improvements could contribute perhaps an additional 2% on the current total, or £1.6 million each year. This increase may seem small, but in terms of attribution, tourists do not tend to visit a location *because of its public realm* per se. However, a poor public realm can have a negative impact on return visitors

⁷¹ See for example ENCAMS (2005) *The Link between LEQ and Economic Improvement*; Giuliani, R. (2002) *Leadership*; SQW Consulting (2004) *Economic value of protected landscapes: Interim report and literature review*, report to One NorthEast; *The Environmental Economy of the West Midlands*, AWM (2001); *The Contribution of the Local Environment to the Local Economy*: Centre for Local Economic Strategies, 2007

and reputation. The strategy identifies the need to improve the public realm due to current concerns with quality which may already be discouraging visitors from returning and having an impact on Lancaster's wider reputation. If so, public realm improvements should have a positive effect if they maintain or slightly increase current numbers, as without the improvements they may fall.

The summary table shows the implications of applying multiplier effects and estimates GVA and employment. GVA over ten years would be £7.1 million which would support 35 FTE jobs (or 350 job years). With investment of £7 million this gives a return on investment of 1:1, although it may be more appropriate to consider this over a longer period of time.

Table 0-4: Public realm

Measure	Value
Net additional expenditure/direct output	£1,600,000
Multiplier	1.20
Total net output	£1,920,000
10 year output (£ millions)	£19.2
Output to GVA ratio	37%
GVA estimate	£710,000
10 year GVA estimate (£ millions)	£7.1
Net FTE jobs	35
Estimated costs	£7.0
Ratio of GVA to costs	1.01

Source: SQW estimates. All values in current (2010) prices

4. THE CASTLE

The Castle currently attracts 30,000 visitors a year. The report describes the constraints that it works under and its role in relation to the Courts and prison. Even so, it remains an important symbol of heritage in the city and new arrangements would encourage an increase in visitor numbers.

Potential impact

A target of increasing numbers by perhaps 40,000 (based on relocation of the courts) up to around 70,000 if the jail was also relocated and major marketing undertaken to transform Lancaster Castle into a regional visitor attraction should be reasonable.

We have assumed that 25% of these visitors come to Lancaster specifically to see the Castle on a mixture of day trips and overnight stays. For overnight expenditure we have used a £60 per visitor but attributed a 2 night stay to the Castle. Using these figures, the additional revenue that could be attracted would be £735,000 a year reaching £9 million after 10 years.

The table shows the implications of applying multiplier effects and estimates GVA and employment. GVA over ten years would be £3.3 million which would support 16 FTE jobs (or 160 job years). With investment of £500,000 this gives a return on investment of 6:1. However, there may also be related public realm improvements which are costed at a further £2.6 million. If these are included and the number of visitors remains the same, this would change the return on investment ratio to 1:1, although again, with public realm projects it may be appropriate to consider a longer pay back period.

Table 0-5: Castle

Measure	Value
Net additional expenditure/direct output	£735,000
Multiplier	1.20
Total net output	£882,000
10 year output (£ millions)	£8.8
Output to GVA ratio	37%
GVA estimate	£326,000
10 year GVA estimate (£ millions)	£3.3
Net FTE jobs	16
	Low = £500,000
Estimated costs	Including public realm £2.6 million
	Low cost gives 6.5
Ratio of GVA to costs	Including public realm gives 1.1

Source: SQW estimates. All values in current (2010) prices

5. MUSEUMS

The city currently has several museum and attractions that are currently attracting around 54,000 visits collectively. The report recommends progressively improving presentation and interpretation in city museums and heritage attractions and improving the catering and retail offer.

These developments would significantly improve Lancaster's cultural-heritage offer and would help justify rises in entry fee and help boost visitor spend in the

economy. For example spend per head at the Maritime museum currently averages below £1 per head and could be increased significantly.

Through our wider tourism work, including supporting the NWDA's Visitor Attraction Fund, we are aware that large numbers of attractions (including heritage based), are developing plans to transform themselves to provide a more suitable and attractive 21st century offer. Lancaster risks slipping further behind if it does not update its museums' existing offer.

Potential impact

We know the types of numbers that museums and other attractions can expect to generate from re-development from our work with the Visitor Attraction Fund. Clearly the actual impact will depend on how the museums are configured, marketed and what they contain, but we would expect this type of improvement generally to increase visitor numbers by perhaps 50% or around 30,000. This is an addition to the numbers achieved currently and would take the total to around 85,000. These would be reasonable targets for museums of this scale.

The analysis assumes that 25% of these additional visitors are from outside Lancaster. The STEAM data estimates average expenditure per visitor to be £60.00. Combining these assumptions generates expenditure of £550,000 a year and additional output by businesses, over 10 years, of £6.6 million. GVA over ten years would be £2.4 million which would support 12 FTE jobs (or 120 job years). With investment of £2 million this gives a return on investment of 1.2:1.

Table 0-6: Museums

Measure	Value
Net additional expenditure/direct output	£551,250
Multiplier	1.20
Total net output	£661,500
10 year output (£ millions)	£6.6
Output to GVA ratio	37%
GVA estimate	£244,755
10 year GVA estimate (£ millions)	£2.4
Net FTE jobs	12
Estimated costs	£2.0
Ratio of GVA to costs	1.2

Source: SQW estimates. All values in current (2010) prices

6. INVESTMENT IN ASHTON MEMORIAL AND WILLIAMSON PARK.

The Ashton Memorial and Williamson Park are important local assets but are arguably less central to the development of Lancaster's tourism. They attract somewhere between 150,000 and 250,000 visits a year, although most of the users are locals rather than tourists. They do however offer some potential for hosting events and attracting passing visitors. A newly refurbished memorial/park would further increase local use and could be part of a more attractive tourism offer in Lancaster.

Potential impact

There are no figures for the number of tourist visits to the memorial or the park. The scope for generating additional visitors is probably weaker than the Castle, so estimates of the potential number of *new visits* to Lancaster that they would generate will be smaller, perhaps in the range of 30,000 a year. Assuming again that 20% are from outside the city, this would mean 6,000 trips. We have assumed that these 20% all stay overnight in the area. The average expenditure of a visitor (based on the STEAM data) is £60.00 and this would mean annual expenditure of £328,000.

The table shows the implications of applying multiplier effects and estimates GVA and employment. GVA over ten years would be £1.2 million which would support 6 FTE jobs (or 60 job years). With investment of £5 million this gives a return on investment of 0.24:1.

Table 0-7: Ashton Memorial and Williamson Park

Measure	Value
Net additional expenditure/direct output	£274,000
Multiplier	1.20
Total net output	£328,000
10 year output (£ millions)	£3.3
Output to GVA ratio	37%
GVA estimate	£121,000
10 year GVA estimate (£ millions)	£1.2
Net FTE jobs	5.92
Estimated costs	£5.0
Ratio of GVA to costs	0.24

Source: SQW estimates. All values in current (2010) prices

7. TOURS AND MARKETING

It is unlikely that the development of heritage tours would, in themselves generate new trips from outside the city. Instead these would be considered as supporting the earlier estimates for Castle, museum and public realm visits. They help animate and strengthen the overall quality of the offer.

The impact of changes in marketing is also not estimated separately here. It is assumed that this is undertaken in order to achieve the targets for the other actions.

Based on the analysis in the previous section Table 0-8 brings the estimates together to present the overall expenditure and GVA estimates for one year and 10 years. The final row provides a total for all the actions which is reduced by 25% to reflect the likelihood that some of the impacts will overlap. This is a ball-park figure which could be further refined once proposals are more worked up. For example, some of the visitors to the festivals and events may stay at the proposed hotel accommodation or be included in the additional visits to the Castle.

All the actions will work together and the estimates assume that these are also supported through the marketing recommendations made in the report. The monetary values are in current (2010 prices).

- ▶ Overall, the full programme would be expected to generate **additional expenditure of £4.8 million a year** after allowing for multiplier effects and potential overlap of visitor numbers. **Over 10 years this would generate GVA of just over £17.9 million.**
- ▶ Annually this would represent an increase of around **4% of total tourist expenditure**. This scale of additional output would typically **support around 90 jobs** over the ten years (or 900 job years)
- ▶ The return on investment for the projects that can be assessed (excluding the Ashton Memorial) over ten years is around 1.4 to 1 (a return of 40%). This does not take into account any increases in the value of property or benefit for residents.
- ▶ These projects are all proposed in Lancaster. **In Morecambe the recommendations focus more on improvements that would relate to housing, quality of life and access and promotion of the natural environment.** These recommendations are not sufficiently developed to produce the types of economic impact analysis that has been carried out for Lancaster.

There are a number of important caveats:

- ▶ At this stage, these figures can only provide an indication of the scale of impacts that could be achieved, or would make reasonable targets for the types of actions set out in the main report.
- ▶ As the details of any of these actions are refined, it will become easier to be more specific about the potential impacts. Each of the themes could be developed in a number of different ways and this will affect the impact.
- ▶ Even so, the analysis does help to put in perspective the scale of impacts that could be achieved and helps focus, from an economic perspective, on the value for money that different propositions might have.
- ▶ We have assumed for simplicity that these impacts start immediately and continue at the same level for ten years. With more detail it would be possible to model how these might be expected to grow or decline over time.
- ▶ The public realm estimates in particular are largely indicative. This work, more than others, is difficult to link to visitor expenditure, while it also has the potential for the greatest impact on residents.

Finally and most importantly, these figures are based on estimates of additional visitor numbers. As discussed earlier, this is only one of a number of ways in which heritage can contribute to the economy. For example:

- ▶ Inward investment - is more likely in attractive environments where heritage is well presented. Securing one or two significant new investments could easily produce the level of economic benefit estimated in relation to tourism.
- ▶ Residents - the improvements would improve quality of life civic pride, contribute to property values and generally make Lancaster a better place to live. This can help generate a positive regeneration spiral, attracting and retaining people and investment
- ▶ Students and the university – the university and its students is a major asset. The look and feel of a place is very important to students and their decisions on where to live after graduating. Lancaster could strengthen these links and make more of these opportunities. From an economic perspective a pool of graduates is a huge attractor for investment and in stimulating new business and innovation. Heritage can play a part in creating the right environment.

Table 0-8: Summary economic impact estimates

	GVA over 10 years (£ millions)	Jobs	Job years	Return on investment (10 years)
Public realm	£7.1	35	346	1.0
Castle (low cost)	£3.3	16	159	6.5
Museums	£2.4	12	119	1.2
Events	£2.4	12	119	12.2
Ashton Memorial	£1.2	6	59	0.2
Hotel	£1.5	7	71	
Total (ex Ashton Memorial)	£17.9	87	874	1.8
Total (after 25% reduction)	£13.4	66	655	1.4

Source: SQW estimates. All values in current (2010) prices