East Riding of Yorkshire Council, Yorkshire Forward,
Bridlington Regeneration Partnership

A STRATEGY FOR REGENERATING BRIDLINGTON

Updated Final Report

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1 BRIDLINGTON'S RENAISSANCE

1.1 This report sets out a strategy for Bridlington's renaissance. It was prepared during 2004, and informed by a number of research streams undertaken at that time. A limited review has been undertaken in 2007 to take into account updated information, particularly with reference to employment change.

Introduction

1.2 Bridlington has been, ever since the railway reached it in the middle of the 19th century, one of the region's most loved holiday resorts. The town is still a major draw for its traditional Yorkshire and North Midlands markets, but cheap flights and reliable weather abroad have dented the town's appeal. Signs abound that better days have gone.

1.3 Bridlington is too special a place and too important to the region – as we show here – to be allowed to decline any further. The town needs new purposes, new ways of making money and new means of creating jobs. We show here that the town is capable of all these things, but that the market will not deliver them without help. The East Riding of Yorkshire Council, the Bridlington Regeneration Partnership and Yorkshire Forward all acknowledge this and are committed to providing the town with the help it needs. These partners joined together to commission us to chart the way forward for Bridlington: to produce a strategy that is capable of renewing the town's fortunes, engaging its communities and exciting the development industry. We show here that the seeds of Bridlington's future lie in the town's greatest and enduring success: people love living in Bridlington.

1.4 These partners had originally proposed to stimulate Bridlington's regeneration with a major new marina with adjoining development land, but the proposal was refused by government following a lengthy and sometimes contentious public inquiry. We explain the reasons for the refusal below. But one of the most important lessons was that any future proposal for a marina would need to be part of, and justified by, a wider strategy for the town, rooted in a fully evidenced understanding of Bridlington's needs and potential. Another important lesson was the need to work in partnership with the town's vested interests – and that too has been learned.

1.5 The Regeneration Strategy we put forward here already has wide public support – and shows every sign of overcoming the obstacles that had stood in the way to full partnership engagement in the past. We have listened carefully to what Bridlington's communities said in the period that led up to the inquiry and since; we have learned from the considerable work on the town charter process; we have had the benefit of a public consultation exercise this past winter; and we have met and discussed the proposals with many of the town's major interests. The commissioning partners have also had numerous meetings with the town's interests and have kept us briefed.

1.6 Bridlington has a wonderful future – as good in the 21st century as it ever was in its heyday in the last years of the 19th century and the first decades of the 20th.

Terms of Reference

1.7 Our task was to provide an overview of Bridlington's regeneration needs, with the aim of identifying, and advising how to deliver, those projects capable of making a 'step change' in Bridlington's fortunes.

1.8 Bridlington was eligible for funds under Objective 2 of the European Regional Development Fund (ERDF), and the Council prepared, and had Yorkshire Forward's approval to, an 'Integrated Development Plan' (IDP) for Bridlington. The IDP process is driven by the rules of the Objective 2 funding regime – and therefore posits a vision for Bridlington, outlines a strategy and nominates the kinds of actions that fit the particular objects of the ERDF fund and that are eligible for funding under it (eligibility requires, amongst other things, projects to have the contracts let for their delivery before the end of 2006).

1.9 Therefore, although we were to have regard for the IDP and its proposals, our instruction was to be more wide-ranging in our analysis of Bridlington's needs and potential with the object of identifying the 'best strategic regeneration proposals for achieving a major step change to Bridlington's economy.' We were to appraise the candidate options against effectiveness and value for money criteria, recommend those that best meet the partners' objectives, and advise on their delivery.

1.10 Our focus has been on capital projects rather than 'soft interventions' such as training, business development support, marketing and the like. While this kind of action is important in ensuring that the capital projects can achieve what is needed and that the benefits of regeneration are equitably distributed, they are supporting interventions that are unlikely on their own to achieve the step change wanted for Bridlington. Nonetheless, we point out where support of this ilk is necessary, although much is already anticipated in the IDP for Bridlington.

1.11 We were commissioned alongside four other, separately contracted, studies, but were responsible for coordinating the work of the other consultant teams. Our task was to ensure a common voice on the vision for Bridlington, the objectives for achieving it and the actions that offer the best prospect of achieving the objectives. The other studies commissioned were:

- a marina options study to examine the feasibility of developing an alternative marina option, capable of overcoming the shortcomings of the previous proposal whilst still delivering very substantial regeneration benefits;
- a Spa Royal Hall and Leisure World study, the purposes of which were to establish the current demand for these facilities and assess their prospective contribution to the local economy under a range of development scenarios – from demolition through refurbishment to full replacement. The Spa is a 1930s-built, multi-purpose conference, performance and assembly hall and a local landmark located on the seafront to the immediate south of the town centre core. Leisure World is a multi-purpose swimming bath, theatre, bowls and health and fitness centre. Both are owned and operated by the East Riding of Yorkshire Council (ERYC). The refurbishment of the Spa was proposed in the IDP, and the redevelopment is well underway.
- a transport study to assess and propose solutions to traffic and access problems in the town and to examine the access and highways impact implications of developments proposed by the study, including the potential for a marina and a revitalised Spa and Leisure World. The study is to feed into the ERYC's Local Transport Plan and inform the Council's integrated transport strategy.
- a business premises study to produce a business space strategy for Bridlington. The work was to examine the need for further business space in the town, and include an assessment of the performance and development potential of the Council owned and managed industrial and business estates at Bessingby and Carnaby. Business premises for occupation by small and medium enterprises are eligible under the ERDF programme, and a project was nominated in the IDP for Bridlington.

1.12 Only the marina and business premises study were completed at the time of the original drafting of this report – although the Spa, Leisure World and transport studies had progressed to the point that we were able to build in their thinking and proposals to the Regeneration Strategy proposed. We do not have sufficient information to conduct a proper appraisal of any one of them.

1.13 Each of these studies is reported separately. We provide a short overview here of the outcome of each as necessary for our purposes, but do not provide full summaries. The reader instead is directed to the separate reports.

1.14 In addition, the partners commissioned RTP's specialist tourism division, with Geoff Broom Associates, to prepare a detailed assessment of Bridlington's tourism economy and its future potential. Again this work is separately reported, and we refer only to the findings as necessary for our purposes.

1.15 The studies did not include urban design or landscape work, nor a detailed property market assessment of the town centre. This is because the studies undertaken were largely driven by the aims of the IDP and the kinds of projects which are eligible for ERDF grant. In Section 7, we advise on how the urban design, landscape and town centre property work are best dealt with by the Regeneration Strategy we recommend. This work has subsequently been progressed through the YF Renaissance Towns Programme together with further work to develop the town centre regeneration project.

1.16 Similarly, it might ordinarily be expected that any focus on the Spa, Leisure World and the out of town business estates might emerge as a recommendation of the strategy, rather than pre-empt these recommendations. Again this is because of the sheer practicalities of the availability of ERDF grant, what is eligible for grant and the timescale within which it can be drawn down.

1.17 In the event, we are convinced by the case for at least some expenditure in the near term to improve the look of both the Spa and Leisure World; both are assets Bridlington cannot afford to lose or let decline further. We are also convinced that there is a need for 'grow-on' space at Bessingby, but feel strongly that the next tranche of workspace for small offices and studios must be in the town centre, and not on an out of town estate.

Structure of the Report

1.18 The report is structured as follows:

- The rest of Section 1 introduces our approach to the work and sets out the local context: the policy context for the regeneration of Bridlington; the reasons for the refusal of the original marina proposal; the approach of the IDP, what it aims to accomplish for Bridlington and the projects it promotes; the 'town charter' for Bridlington that was prepared under Yorkshire Forward's urban renaissance programme; and what we have learned from the various consultation exercises the partners and we have undertaken.
- Section 2 sets out the wider context: the research evidence on the prospects of seaside resorts generally; the evidence, from the ODPM-sponsored Core Cities research but with application to Bridlington, on the unique capabilities of town centres; the lessons on best practice in regeneration we have had regard for; and the trends in tourism which set the parameters for Bridlington's market.
- Sections 3 and 4 present our analysis of Bridlington's needs and potential – our 'performance analysis': what describes Bridlington as a social economy; what factors explain why Bridlington under-performs where this is the case; why it succeeds where it does; and what assets it has that offer potential for improving its performance.
- Section 5 presents our assessments, and those of the other consultants, of prospective demand in the sectors that are most important to Bridlington's regeneration: employment, tourism spending, retail spending, central area housing, demand for the Spa and Leisure world, demand for business space and demand for marina berths.
- Section 6 summarises the results of our performance analysis, focusing on the factors that account for its performance, and presents our vision for Bridlington, the objectives for achieving it and the candidate projects for achieving these objectives. In a final version of this report, we will present a more formal appraisal of these project options.

- Finally, Section 7 summarises the Regeneration Strategy we propose for Bridlington, the actions to achieve it and our advice on delivering these, including the next steps to be taken by the partners to achieving the vision – now shared – for Bridlington.

Our Approach

1.19 The purpose of the Regeneration Strategy is to achieve change in Bridlington that the market will not, on its own, deliver – either at all, or to the same standard or quality, or with the same value to the local economy. The strategy for achieving this change needs to be robust enough to withstand scrutiny at public inquiry – which means that the strategy needs to be correct (the right interventions for the right reasons), deliverable, supported by the public and capable of justifying the public's expenditure.

1.20 The purpose of the Regeneration Strategy is to achieve the stated policy objectives for Bridlington. At their most basic, these objectives are the same as those for creating sustainable communities anywhere else in Britain: high and stable levels of economic growth and employment, social progress that meets the needs of everyone, effective protection of the built and natural environment, and the prudent use of natural resources (we summarise the specific policy objectives for Bridlington below). The specific objectives of the Regeneration Strategy merely articulate what is necessary in Bridlington to achieve these higher order aims.

1.21 The Bridlington Regeneration Partnership was constituted because the market in Bridlington is not delivering these very basic policy aims. Bridlington under-performs: there are high and persistent levels of unemployment; average incomes are low; in large parts of the central area, property is under-used, used sub-optimally or poorly maintained; the town centre fails to capture a significant share of the shopping and leisure spending of Bridlington's residents; and the profitability of much of the local tourism industry is too marginal to permit needed renewal investment.

1.22 Our approach to the work – and the basis for the Strategy we put forward for Bridlington – is designed to:

- show where Bridlington underperforms and to expose the factors which explain or cause the under-performance;
- identify the assets and other opportunities the evidence shows might be capitalised upon to improve the town's competitiveness; and
- identify, based on the evidence, where physical change should be capable of correcting assets and taking advantage of other opportunities for enhancing performance.

1.23 The approach focuses on producing the evidence and undertaking the analyses needed to identify the interventions that will be effective (will lead to) the outcomes sought in improved performance; efficient (proportionate to the outcome required); and offer value for money (produce benefits in excess of costs, and do so more effectively and efficiently that alternative options for achieving the same or similar objective).

1.24 The approach takes into account the fact that the public sector is barred, under public sector spending rules, from undertaking activity that is the province of the private sector: the activities of the public sector should not displace or crowd out the private sector. Thus the focus of the public sector should be on interventions that remove the obstacles that have prevented the proper functioning of the market (or make more equitable the market's distribution of benefits) – that is, interventions that will 'correct' what has caused the market to fail or perform sub-optimally in the first place. Similarly, the approach takes into account the fact that underperformance can also occur for institutional reasons (e.g., because a strategy is ill-founded and therefore ineffective; policy is inappropriate; leadership is lacking and so on).

1.25 Our approach also takes into account the prospective demand (or need) for the town's key services – employment, retail and leisure, housing (although we confine ourselves to town centre housing),[1] tourism activity (including the services offered by the Spa and Leisure World) and business property.

1.26 It is clearly essential to the deliverability of the Strategy that it be grounded in a realistic view of how much demand Bridlington could conceivably expect to realise from these sources. Our aim is both to gauge the extent to which market failures in the recent past have frustrated demand that might otherwise have been realised, and to understand how much growth it is reasonable to plan for (and reasonable therefore to invest the public sector's money in helping to realise). Prospective demand for services and property in Bridlington is what the Regeneration Partnership will have to work with to deliver the physical change that is required.

1.27 Our approach, therefore, considers both the supply (the 'place', infrastructure, land and property, the labour market) and the demand sides (employment, retail spending, the use of the Spa and Leisure World, tourism spending, property take-up and the pressure on highways infrastructure, parking etc.) of Bridlington's economy.

1.28 Our focus on the supply side of the economy is the town as a physical place,[2] land and property and the labour market. On the demand side, our focus is on the sectors of the economy that are most critical to the performance of the local economy – chiefly town centre services (because these sectors, our analyses show, are the most significant sources of employment growth, and Bridlington needs jobs) but also property to house the full range of business activities the town does, and can expect in future, to accommodate.

1.29 We have asked, in each area of inquiry, the same broad questions:

- What are the principal features that describe Bridlington and in particular the part played by the town centre?
- What is performing well and what is not?
- What factors, independently and in combination, explain Bridlington's performance?
- Of the 'causes' of under-performance, which lend themselves to 'correction' via physical intervention? [3] Of the 'causes' of good performance, what opportunities are there further to exploit Bridlington's assets to its advantage?
- What other opportunities are there for increasing demand (where this is desirable) or for sustaining this new activity?

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1 As we explain in Section 3, we do not have the data at the spatial level that will allow us to make a market-based projection of demand. In any case the market is distorted by planning policy which aims to control the release of land, and the Council has not yet done the detailed work it proposes to assess the brownfield housing capacity in the town. Our principal concern is with increasing and diversifying the residential spending base in the centre of the town for the reasons we set out in the next section.

2 We rely for the physical analysis on the work done for the town charter – although we have taken into account WSP's transport work which addressed the same questions we list at paragraph 1.23. In the final section of the report we recommend that a fuller urban design exercise be carried out on the town centre, as part of the work to develop our proposals for capturing the town's demand potential in retailing and taking advantage of the opportunities in the centre to provide significantly more new residential and leisure development.

3 There is an unavoidable element of circularity (i.e., a cause in one sector is an effect in another) in trying to identify the factors which explain why any particular aspect of Bridlington's performance is as it is. Nonetheless, the approach has considerable utility in identifying the factors, and relationships between them, which will need to be influenced or altered to effect the changes sought via the strategy – both physical changes and other kinds of "soft" interventions (e.g., marketing, business support measures, education and training). The aim must be to cure the patient, not just to relieve its symptoms. For example, Bridlington's lack of a distinctive identity as a tourism destination (insofar as this is true) is principally a consequence of the limited investment in the town over most of the post-war period; but the limited marketability of the town is also a cause of its waning strength in the tourism market. But attempting to deal with the identity (a symptom) is unlikely to tackle why Bridlington is under-performing as a tourism destination (which is instead explained by the shrinking size of its core market and better-placed competition for it).

1.30 The synthesis of these analyses produces the framework for the Regeneration Strategy: the vision for Bridlington (where it wants and can go); the strategic objectives for realising the vision (i.e., what the Regeneration Strategy needs to do to correct the causes of under-performance, utilise better Bridlington's existing assets and to attract and support new sources of demand); and the actions required to achieve the objectives and therefore the vision.

1.31 The strategic aims and more detailed objectives put forward in Section 5 also provide the 'brief' (as the next step in delivering the Strategy) for completing the urban design, public realm and transport work – i.e., the Masterplan – for the town. The brief is the set of instructions for the urban design work – the physical plan for accommodating the town centre redevelopment scheme we propose (Section 6), integrating the marina option we recommend (Sections 5 and 6) with the town centre and Spa, creating the landscape (public realm) strategy we recommend (Section 6).

1.32 Because our focus is on understanding causal relationships, the partners' priorities for intervening in Bridlington's markets are a straightforward output of the process. The partners' aim must be to cure the patient, not merely to palliate its symptoms. The interventions must be those that are the most important and most urgent – and which will set the conditions that are necessary for all other positive change to build upon.

The Policy Context for Bridlington's Regeneration

1.33 At the regional level, the relevant economic development policy statements are the Regional Economic Strategy and the Yorkshire & the Humber Objective 2 (2000/06) Single Programming Document (Regional Planning Guidance is also relevant and we summarise its emphases below). Local activity is required to contribute to achieving the strategic objectives that each sets. Regeneration activity in Bridlington should have a direct relationship to its wider policy context. Table 1.1 below summarises the objectives of each of these strategic statements.

Table 1.1 – Strategic Policy Objectives for Yorkshire & the Humber

Regional Economic Strategy, 2005/16	***Yorkshire & the Humber Objective 2 Programme (2000/06)***
1. More businesses	1. To stimulate a stronger business dynamism
2. Competitive business	2. To improve competitive performance of existing businesses
3. Skilled People	3. To reduce levels of deprivation
4. Connect people to jobs	4. To increase business investment and economic growth
5. Enhanced transport, infrastructure and environment	5.To enhance the achievement and sustainability of these aims by underpinning them all with excellent skills and human resource actions
6. Stronger cities, towns and rural communities	

1.34 Both of these economic development policy statements have a direct relationship with Regional Planning Guidance for Yorkshire & the Humber (RPG12), which is soon to be replaced by the Regional Spatial Strategy (the Yorkshire & Humber Plan – the Draft Plan) which has a time frame extending to 2021 and beyond. The Draft Plan shares its central policy objectives with national planning policy (which are the same policy objectives we refer to in describing our approach at paragraph 1.19). The Draft Plan focuses development on the region's towns and cities, with a focus that is at the heart of the emerging regional spatial strategy. The Draft Plan also acknowledges the particular economic and environmental challenges of the region's coastal towns.

1.35 The Draft Plan designates Bridlington, Beverley and Driffield as principal service centres which are the main local centres, acting as service, transport and employment hubs for the surrounding area. RPG and draft RSS is unequivocal that Hull is the main urban area within the sub-region and that Hull city centre at the top of the hierarchy. Hull is accordingly the sub-regional centre to which Bridlington relates.

1.36 The Joint Structure Plan (JSP) for Kingston upon Hull and the East Riding of Yorkshire (adopted following an examination in public at the beginning of 2004, and the Panel report which was published in April 2004) is the most up to date local planning policy for Bridlington and will act as the Core Strategy until it is replaced by the Core Strategy for the East Riding. The Local Plan was adopted in 1997, but was prepared over several years in advance of this, and policy at national and regional level has moved on significantly in the intervening period.

1.37 The JSP's vision is:

> *'To achieve more sustainable patterns of development and movement to support:*
> - *revitalised and interdependent urban, rural and coastal areas;*
> - *more inclusive communities; and*
> - *a better quality of life for everyone in Kingston Upon Hull and the East Riding'.*

1.38 The JSP's spatial strategy is structured around four sub-areas. Bridlington is in the eastern sub-area which takes in the whole of the sub-region's coastal zone from Flamborough Head Heritage Coast to Spurn Point. The JSP's priorities for action in the eastern sub area are:

a) regenerate and diversify the coastal economy;.

b) improve accessibility, including public transport and ICT link;

c) sustain housing markets and support regeneration, rather than plan to accommodate additional growth;

d) regenerate, strengthen and connect together coastal towns as service, economic and transport hubs;

e) focus housing market renewal activity on Bridlington and Withernsea; and

f) Protect and enhance the natural beauty of the coast and its natural and built environment.

1.39 Bridlington is defined as one of three principal towns in the JSP area (which adds Goole to the two market towns in the sub-region designated by RPG12), and the main settlement in the eastern sub area. Principal towns, in JSP policy, are to function as the focal points within their sub-area for housing, public transport, employment activities, shopping, cultural and community facilities, providing a complementary and supporting role to the sub-regional urban area. Policy states that development and regeneration should support and enhance the function of these areas.

1.40 JSP policy in respect of Bridlington recognises its high level of 'urban development potential,' and its 'anticipated future economic growth prospects.' Policy states that Bridlington's regeneration should enable it to function as a 'significant service and employment centre' and acknowledges that it will require a greater level of development than other towns in order to achieve this.

1.41 The Local Plan for the East Riding Borough was adopted in mid-1997, and was prepared over several years prior to its adoption. Planning policy, regionally and nationally, has moved on considerably since, and the Local Plan is out of date in a number of respects. While it remains the development plan for the town (until it is replaced by a Local Development Framework under the new planning system). Thus the JSP is a better indication of the thrust of policy.

1.42 The 1997 local plan for the borough does not envisage very significant growth for Bridlington – chiefly to contain growth on greenfield land on its periphery. The ERYC is in the process of determining the housing allocation for Bridlington in the period to 2016 (but assumes that the eastern sub-area will contribute an average of 200 additional dwellings per year over the period to 2016, about 20% of the East Riding's annual average obligation). ERYC, as do we, take the view that there is considerable brownfield capacity in Bridlington's built up area that should be fully exploited. We are particularly keen to encourage residential development in the centre, as we set out in subsequent sections.

1.43 The Council has now begun the process of preparing its Local Development Framework for Bridlington under the new planning act. The Regeneration Strategy proposed here, has become the basis for the Area Action Plan for Bridlington Town Centre where change will be greatest, as well as informing other Development Plan Documents which will apply to the town. We commented further on this in the final section of the report in the context of our advice on the delivery of the Regeneration Strategy.

Bridlington's Town Charter

1.44 Bridlington is one of Yorkshire Forward's 'renaissance towns' – a scheme designed to build local capacity for urban change and to create, through the work of a community-led 'town team', a long term vision for each of the benefiting places set out in a 'town charter.' Each town was given the resources to employ a leading urban design practice to facilitate, working with a core team of representatives from the community, a series of planning for real-type events to create, from the 'bottom up', a framework for change that reflects local aspirations. The town team for Bridlington formed the Bridlington Regeneration Partnership.

1.45 A draft charter for Bridlington, based on this process, was published in the summer of 2003, before the decision on the original marina proposal was known and this tranche of studies was commissioned. The draft charter assumed that the marina would be built and all that it was to bring in new development would follow. The 2003 draft of the charter also assumed that Bridlington's future lay principally in the tourism sector, although it focused principally on public realm schemes to give the town a more marketable identity and to improve its visual appeal – including exposing, in a linear central area park, the old Gypsy Race (that runs into the harbour) – and on schemes to enhance the linkages between the town centre and the Old Town and Sewerby.

1.46 We have also involved the Bridlington Regeneration Partnership in our work, and the final version of the charter (published in June 2004) has taken on board our principal recommendations. There is greater emphasis on encouraging the diversity of Bridlington's economy and the principal focus for physical change is the town centre, less for encouraging tourism than to improve operating conditions for Bridlington's businesses and improving the centre's appeal to Bridlington's residents. A marina is promoted, but our recommendation that it be fully linked to the existing town centre core is incorporated and our notion of 'zoning' the seaside holiday activity, principally through well-designed public realm, is also incorporated. The Gypsy Race, again as we propose, is revealed, but in line with our recommended strategy, becomes the spine and setting for a public walkway and new redevelopment to link the station to the town centre and harbour (and to the new marina proposal).

The IDP for Bridlington

1.47 The original IDP for Bridlington was prepared at the inception of the 2000/6 Objective 2 Programme and centred on the marina as the lynchpin for achieving the step change sought in the local economy. The expectation was that the marina would broaden the market for the resort and in doing so would generate sufficient development demand to justify the creation of some 14 hectares of land to adjoin the marina. The projects put forward for funding under the IDP were therefore designed to maximise the town's ability to capture the benefits generated by the marina development and to put in place the mechanisms needed to ensure that the less well-off in the town were full beneficiaries of the scheme.

1.48 The marina decision forced a re-working of the IDP, and a revised strategy was approved by Yorkshire Forward early in 2004. The revised IDP starts from the same position we do:

'The operation of market forces is such that local economic performance overall is sub-optimal, generating insufficient jobs and wealth and resulting in high levels of social and economic exclusion.'

and

'Once Bridlington becomes a better place in which to live and invest, a new market equilibrium can be established between tourism, liveability in a town by the sea and a good place to visit..'

1.49 The IDP now focuses on the studies needed (chiefly those reported here) to identify a deliverable programme of change in Bridlington that will still achieve the step change sought in the town's performance. The IDP again focuses on tourism as the key to the town's revival (because tourism projects are eligible for ERDF funding); it again promotes a marina and proposes the refurbishment of the Spa, and also promotes improvements in the performance of, and facilities for, small and medium enterprises generally.

1.50 The principal constraint of the programme is that projects must be ready for delivery not later than the end of 2006 (which is a very short timetable for major capital projects). The IDP proposes a total regeneration package of £21.7 million, of which £7.3 million is from EU Objective 2 and the remainder from a mix of EYRC, YF, East Riding College and private sector match funding.

1.51 The main actions are set out in a series of packages as follows:

- *IDP Delivery Vehicle* – A delivery vehicle for both project management of IDP projects and feasibility, development and study work to inform the activities proposed within the other packages. The Delivery Vehicle is to coordinate the delivery of the IDP packages.
- *East Coast Tourism and Visitor Strategy* – including the refurbishment of the Spa to provide a modern, quality conference and events venue, together with a public-private partnership approach to marketing and branding Bridlington to investors and to visitors.
- *Bridlington Urban Renaissance* – public realm improvements and grants (tied to SME support) for tourism accommodation.
- *Specialist Business Space and Support*[4] – an integrated range of premises and support, including managed incubation space, managed 'grow-on' accommodation next to the existing Enterprise Centre and new industrial premises at Carnaby Industrial Estate; the package also includes premises refurbishment for SME occupation supported by dedicated business support to SME occupiers and their suppliers.
- *Marine and Coastal Asset Development* – A package of feasibility and option appraisal studies to establish the viability of creating a marina, water-sports and outdoor leisure/holiday facilities to the south of Bridlington, and to provide for studies into other 'suitable' projects to harness the Bridlington Bay asset.

1.52 In Table 1.1 below, we comment on the proposed IDP projects, listing them in their order of priority (an showing which projects are already committed and underway) they relate to the regeneration strategy we put forward here. We return to this assessment in Sections 6 and 7 of the report.

[4] The IDP's proposed 'Development Village' which was heavily reliant on funding from the College proved infeasible and has been dropped.

Table 1.1 – IDP Projects and the fit with the Regeneration Strategy

Package and Project	*Underway*	*High priority*	*Medium Prio*	*Low priority*	*Comment*
Delivery Vehicle Package: Studies					
Marine & coastal asset devt project mngt	■				*Scott Wilson's Study*
Spa Feasibility and economic impact	■				*Pan-Leisure's study*
Spa project management		■			*Pan-Leisure study; conclude must invest to stand still and management a key issue*
Transport study/coach park relocation	■				*WSP's study*
Urban Renaissance project mgmnt.		■			
Urban Renaissance early works plan		■			*Early wins*
Urban Renaissance devt and funding strategy		■			
Business premises/tourism SMEs proj mgmnt		■			*Drivers Jonas study*
Business premises study	■				
Bessingby move-on accommodation		■			
Branding/marketing project manager				■	
Branding/marketing strategy devt				■	
East Coast Tourism & Visitor Strategy Package					
Spa and environs (and Leisure World) Phases 1 & 2			■		*Pan-Leisure study; capital allowance for refurbishment*
Marketing/branding				■	
Conference bureau/promotions			■		*Awaits completion of refurbishment; but preparation part of demand work*
Urban Renaissance Package					
Urban Realm Phases 1 & 2			■		*Link to regen strategy projects*
Tourism SMEs capital support				■	
SMEs revenue support/TC Manager			■		*TC Manager element*
Specialist Business Space Package					
Development Village business incubation & media centre					*Not proceeding*
Bessingby Enterprise Centre move-on accommodation		■			*Link to DJ study*
Carnaby Estate improvements		■			*Link to DJ study*
SME support/refurb				■	*Link to DJ study*
Marine & Coastal Asset Development Package					
Options study into marina facility	■				*Scott Wilson's Study*
South Brid watersports and outdoor facilities				■	*Not a priority*
Partnership Approaches Package					
IDP co-ordination and promotion	■				

1.53 Much of the project activity set out in the IDP relates to the current studies that are underway and have fed into production of this Strategy and the subsequent work to implement the findings of the individual studies. However, there are certain areas which do not directly fit with the Regeneration Strategy as follows:

- The Development Village proved not to be viable and has been dropped. A feasibility study was completed in 2003, but the College has since decided not to proceed: the timescales did not suit its own programme, and there was a funding gap that could not be filled;
- Branding/marketing activity cannot be successfully undertaken until the town has substantially changed as a result of the Regeneration Strategy;

- Conference bureau/promotions activity is premature;
- The south Bridlington watersports and outdoor facilities is thought to be unlikely to deliver significant economic impacts; in any case, it is not sensible to dissipate demand for facilities that might better be part of the marina project.

1.54 The outputs expected to accrue from delivery of the IDP are as follows:

Land developed	4.3 ha	Jobs accommodated (gross)	119
Refurbished floorspace	11,100 m2	Jobs accommodated (net)	75
New business space	9,010 m2	Small/medium businesses assisted	245
Jobs created (gross)	200	Increased business sales	£11.5m
Jobs created (net)	170	Net additional added value	£8.3m

Public Consultation – What We Have Learned

1.55 The partners, including through the town charter process, have carried out a great deal of public consultation, all with the aim of learning from residents', businesses' and visitors experience of Bridlington and their views on its prospects: what they like and do not like and why; what kind of future they feel Bridlington should have; and what they believe needs to be done to achieve this better future. We have been briefed on all of this, and have listened carefully. The consultancy team also took part in an 'open forum' at Leisure World in February designed to give people a chance to speak to the different consultancy teams; some 350 attended and gave their views on a wide range of issues.

1.56 Very briefly, this is what we have learned from the various public consultation events (with apologies for brevity and distillation, given the huge number of comments people have made in the last three to four years):

- What is wanted:
  - more and better jobs, including jobs attractive enough to retain young people
  - a more diverse economic base, in particular less dependence on seasonal tourism
  - much better control of the seasonal effect of crowds, road congestion, parking shortages, noise, seaside 'tat' and sometimes anti-social behaviour
  - a much better quality town centre – prettier, cleaner, more and better shops, nicer public spaces to relax and gather
  - more and better located parking
  - more things for young people to do
  - better performing schools, especially at secondary level
  - better connections between the town centre and Old Town
  - better facilities for the fishing industry (especially wanted by the fisherman)
  - preservation of Bridlington's character and identity
  - better hotels.
- What is liked (and needs to be preserved or made more of):
  - the natural assets – the seaside and access to / views of it
  - Bridlington's heritage – its good old buildings, the harbour, the Old Town, Sewerby Hall
  - Bridlington's character.

1.57 At the open forum event, the issues that generated the most interest and debate were road access, traffic congestion and parking sufficiency – problems that were very seriously affected by what we call the 'seasonal surge.' A survey of businesses in Bridlington conducted by Drivers Jonas found that even office-based businesses avoid operating from the town centre because of access and parking problems;

these are perceived as being so bad during the season as to deter them from the town centre all year round.

1.58 The next greatest concern was the desire for improvements to the town centre, with people critical of what they see as a limited range and poor quality of shops, a lack of choice of cafes and restaurants, concerns with litter and cleanliness, antic-social behaviour and the general view that there is a lot of derelict land poorly maintained buildings for the size of the town centre.

1.59 There was general enthusiasm for the refurbishment of the Spa to enable it to be used more fully, and many voiced the need for more activities for younger people. Many also commented on the need for all weather facilities for the town – but new, modern facilities rather than the out-dated provision that Leisure World represents.

1.60 It was overwhelmingly clear that people, regardless of their concerns, like living in Bridlington. Many want change, but want it for the better. The more cautious are concerned that change could produce a worse place and destroy the town's historic character and traditional seaside ambience. The vast majority in favour of change simply want to see it happen!

Big Ideas

1.61 In September 2003 the Free Press invited people to put forward their 'big ideas' for improving Bridlington and, in the same month, the East Riding Mail held a public meeting at the Spa. The Bridlington Protection Group has also produced a booklet entitled *Bridlington – Some Ideas for Development.* The combined output of these processes resulted in ERYC's Big Ideas for Regeneration which was the subject of debate in January 2004. The Big Ideas for Regeneration produced the findings summarised in Table 1.2 below.

1.62 Most of the 'big ideas' spring from the assumption that Bridlington's prosperity rests on a more diverse tourism offer – an assumption the evidence we cite in Sections 2, 3 and 4 partly refutes, although there is no doubt that part of the answer to improving Bridlington's competitiveness does lie in a more competitive tourism product.

1.63 As a footnote to the 'ideas' for improving Bridlington's performance, we stress that these ideas have merit only insofar as they have the potential to be cost-effective (will lead to the outcomes sought and offer value for money) and are deliverable (i.e., are technically feasible, are 'needed' or there is demand for them, are financially viable and can attract the necessary risk investment). Most, sadly, could not meet these criteria.

Table 1.2: The Public's Big Ideas for Regeneration in Bridlington

Big Tourism Ideas	Big Leisure Facilities Ideas
- *Revised marina* - *New pier* - *Revamp Spa/Leisure World* - *Conference Centre* - *HMS Bounty* - *Tourist Centre eg Danes Dyke*	- *Better recreational and entertainment* - *Theme Park / Disney or Legoland style e.g. at Wilsthorpe* - *Eden Project Style Development* - *Boating lake and park* - *Move fun fair* - *Weather protected area at sea front* - *Cinema* - *Holiday Village / Centre Parks style*
Big Sport Ideas	**Big Youth Ideas**
- *Surfing beach* - *All-weather sport/leisure* - *Sports stadium* - *Skating rink* - *Ski slope* - *Sand sports* - *Jet ski centre* - *Lido* - *Improved harbour/half-tide cill small marina*	- *skateboard/wheelie centre* - *Mountain bike centre/Danes Dyke* - *Children's play park, southside*
Big Buildings/Development Ideas	**Big Transport Ideas**
- *Restore sea front gardens* - *Improve/develop Sewerby eg arboretum, zoo* - *New hotel* - *Museum/visitor centre (naval, maritime, fishing)* - *Better shops eg Freeport, multinationals, markets* - *Retail park eg Carnaby*	- *Park and ride/people mover* - *Multi-storey car park* - *Pedestrianise town centre* - *Regional Airport, Grindale* - *Ferry port, Wilsthorpe* - *Better road/rail links* - *Transport interchange* - *Travel centre* - *Rail/road freight handling, Carnaby*
Big Business Ideas	**Other Big Ideas**
- *Seamanship Centre* - *Aquaculture in Bay*	- *Fish/shellfish processing centre* - *Urban Renaissance draft charter proposals e.g. Gypsy Race and South Forest* - *Visitor centre*

Reasons for the Marina's Refusal

1.64 The inquiry was held under the provisions of the Transport and Works Act 1992 to hear objections to four related orders made by the EYRC to create a marina and some 14 hectares of new development land. The inspector recommended and the Secretary of State agreed that three of the four orders (marina works order, harbour revision order and harbour empowerment order) should not be made; the inspector recommended that the fourth (revisions to the harbour constitution) be made, and it came into force early in the summer of 2004.

1.65 Our main concern here (we deal with the marina itself in Section 6) is with the economic case for the marina. The basic principle is that the benefits a marina generates will need to be very substantially greater than the costs – measured financially both directly in terms of the cost project and indirectly in terms of the unavoidable disruption (losses to) the business of the town during its construction, and measured environmentally in terms of the cost of the impact, during construction and on operation, on the sensitive coast and the listed piers.

1.66 The inspector did not question that the marina, together with the development of the land in conjunction with it (which included the refurbishment of the Spa and the development of a 100 bedroom three-starred hotel to support it), could produce the economic benefits claimed for it.

1.67 He did note, however, that the major share of the economic benefits claimed for the marina would arise not from the marina itself, but from the development proposed on the 14 hectares of land to be created alongside it – particularly the refurbishment of the Spa and the proposed hotel. He rested a great deal on his view of the credence of the evidence that the town has a strong future as a convention location, with the refurbishment of the Spa and the development of the hotel, although he did not question the basis of the former, nor question the feasibility of actually delivering the hotel. He agreed that the marina would diversify the visitor market and encourage a longer visitor season and thereby increase spending in the town.

1.68 Most significantly for our purposes, he agreed that a marina development, with associated investment in related landside facilities, would be more likely to achieve the objectives for improving the economy of Bridlington than any of the other possibilities examined by the Council and its partners. He agreed that attractions built some distance from the town centre would not deliver the same boost to existing traders, nor would wet weather attractions create the same levels of new employment or offer the same inducement to the growth of the conference market.

1.69 The inspector also agreed that there was a sound case for the development of a marina for the 500 berths proposed; that it would be the optimal size for the efficient operation of a marina. He concluded that a 160 berth alternative in the existing harbour only would have its own problems and would not generate any land for the ancillary facilities necessary for the operation of a marina.

1.70 The inspector considered that the case for the marina – in terms of the number of berths and its impact on spending in the town and employment, particularly through the impact on the Spa and the proposed hotel – was made out.

1.71 But the Inspector also noted that neither the order for the marina, nor the deemed planning permission, covered either the proposed developments or the new facilities proposed for the fishermen. The inspector questioned the commitment to the developments, and was not convinced that the development of shops, offices and commercial or leisure facilities were a necessary part of the development mix. Indeed he saw a contradiction between the desire to link the marina to the town centre (to assist it) and to proposals for (inevitably competing) retail, leisure and commercial development on the made land. He also took the view that the latter would be contrary to the development plan, and was not convinced of the basis for the departure (however out of date the local plan).

1.72 The Inspector also noted the land to be created by the construction was greater than the size of the whole of the established town centre, and was convinced by the evidence submitted by objectors that the development of these uses at the marina would have a deleterious effect on the town centre, the performance of which he agreed was 'fragile.'

1.73 The inspector did not dwell on the connection between the job creation evidence (which he found convincing) and the risk he concluded would be posed to the existing town centre, although he did note the uncertainty surrounding the delivery of the proposed development of the made land. He expressed concern over the Council's view that it could take as long as 10 years, and saw this as introducing considerable uncertainty as to outcome.

1.74 He was also not convinced that the planning policy basis for the development of this land was secure, and agreed with objectors that it would be preferable for development proposals of this scale and out of step with the development plan should instead be pursued through the local plan (although he accepted that the inquiry into the order was one way of allowing the public to air its views and to have the soundness of the proposals tested).

1.75 The inspector summarised his reasons for declining to make the orders as follows:

> '…*it is my view that the lack of clear justification for the size of the reclaimed area, the conflicts with planning guidance, the environmental impact of the loss of a large and particularly important area of beach, and the damage which would be caused to the listed piers, allied to the uncertainty within which eventual development of the reclaimed land would be achieved and the possible impact on tourism in the meantime outweigh the economic benefits which could be anticipated from the Council's proposals for both the marina and the subsequent landside development. I do not consider the lack of an alternative, at present, capable of delivering the same level of economic benefit as the Council's scheme is an argument strong enough to make such an unacceptable scheme acceptable.*'

1.76 The lessons from the economic and development aspects of the case are clear:

- if a convincing economic case for a marina is to be made, it needs demonstrably to improve the performance of the existing town centre (and not to pose a risk to it);
- any new land to be created as part of the marina works and not directly related to the commitment, or certainly evidence that development interest will be forthcoming);
- any significant departure from the local plan should be anticipated in the new Local Development Framework and the LDF should be well through the system (if not yet tested at local plan inquiry);[5] and
- deemed permission for the development of this land needs to be included within the order (particularly if the promoting authority is the ERYC, which is also the planning authority).

1.77 In the final section of this report, we return to these points. As indicated above, we propose a major redevelopment project in the town centre, taking in the existing land adjoining the harbour, making use of under- and poorly-used land and property to remove deterrents to the market's willingness to take a risk on capturing prospective retail, leisure and residential demand. Careful thought needs to be given to whether the compulsory purchase order likely to be needed to assemble a viable site for this scheme should be considered at the same time as the orders to create a new marina.

Physical Change is only Part of the Regeneration Task

1.78 Although the Regeneration Strategy focuses on physical change, this is just part of the Partnership's regeneration armoury. Other kinds of interventions – e.g., marketing for investment and for tourism, skills training, business development support, collaborations with the College and so on (some of which are proposed by the IDP) – will be needed alongside the physical changes to achieve the aims of the Strategy we put forward. These other initiatives are needed for two reasons: to ensure the benefits of regeneration are equitably distributed; and because the physical changes sought by the strategy will require both new markets to be created and for other markets, only just developing, to be expanded.

1.79 In the next section, we examine the wider context for our analysis and ultimately for our recommendations on the Regeneration Strategy for Bridlington.

[5] As we set out in Section 6, the development proposal we put forward to connect the new marina to the town centre is within the adopted Local Plan's defined shopping centre. Although the local plan does not allocate housing sites in the centre, the JSP promotes housing development on brownfield land in the principal towns, of which Bridlington is one. We comment in Section 7 on the planning policy implications of the proposals, and our view of what options are open to the Council to put the marina and adjoining development on as firm a policy platform as time will permit, given the urgency of proceeding with the marina.

2 THE WIDER CONTEXT FOR THE STRATEGY: SEASIDE TOWNS, TOWN CENTRES AND BEST PRACTICE IN REGENERATION

Introduction

2.1 We set out in this section the wider context for the Regeneration Strategy for Bridlington: what lessons we should be taken on board from best practice in regeneration; what the research evidence tells us about the potential for the revival of seaside towns and the characteristics that appear to correlate with successful performance; and what research tells us about the particular advantages of a town centre location.

2.2 The overview set out here, together with the review of local issues in the previous section, provides the essential context for the performance analysis of Bridlington we present in Sections 3, 4 and 5 that follow.

Best Practice in Regeneration

2.3 Best practice in regeneration tells us:

- every piece of land in the town centre should have a specific job to do. Town centres have very particular characteristics, and these should offer advantages unavailable in other locations; under-used, poorly-used and abused land and property are symptoms that these jobs are unclear or mis-allocated; poorly used land diminishes the advantages that the centre as a whole should be able to offer);
- the jobs for the land should be dictated by what Bridlington's jobs are: what kinds of wealth the town is best placed to generate; what kinds of services, on what scale, it must deliver and to whom, where; and what additional services it needs to deliver to ensure well-being[6] and its fair distribution;
- central Bridlington needs to be competitive (the place of choice within its sub-regional catchment for the majority of purchasers and investors) in its core markets – retail and leisure, culture, civic functions, office-based activity, 'lifestyle' living and tourism, most particularly its core seaside market and its higher spending conference and short break markets;
- the town centre should contain a concentration of the factors which drive competitiveness in the catchment Bridlington serves (skills, investment, innovation, enterprise, competition); and
- the town centre should have unique, un-substitutable capabilities (offer advantages which other locations cannot for all the town centre's core activities).

2.4 Recent experience of success in changing the fortunes of previously under-performing local economies – including a number of seaside towns (as we show in Section 3) – it is clear that:

- major change – repositioning a local economy in its markets and changing the perceptions of opportunity by investors and householders – requires *major* projects; no matter how worthy, a series of small increments, even if achievable, do not work; and
- to change the market's perceptions of the opportunities offered by the place, major projects with major public realm, animated in part by important public buildings, would appear to be the most effective approach – suggesting that public access is hugely important (in other words, even an iconic inward investment by a major firm, or even an iconic cultural project that is isolated or is not part of a major public realm scheme, is inadequate on its own to reposition a place in the market).

[6] Well-being is shorthand for enough jobs, incomes in line with or better than the national average, and good quality of life for all – and is aim of the policy objectives set out in 1.16 that are obligation of the public sector.

2.5 It is also a fact that concentrating public sector resources achieves more significant impacts and achieves greater progress towards desired outcomes (measurable improvements in well-being) than spreading its resources over a large number of initiatives, risking (almost inevitably) that none will be as effective as intended.

2.6 This is particularly the case in regeneration development – and is now well understood by the principal agencies. It follows that where, physically, resources are targeted is equally important. The Partnership subscribes to these principals – concentration, major projects, public access and the town centre – principles which the marina order inquiry inspector also accepted.

Post-industrial Economies and the Unique Capabilities of Town Centres

2.7 While the research on cities we summarise below is drawn from experience principally of our post-industrial cities, there are applications to Bridlington as a principal town.

2.8 In our post-industrial economy, and in an era in which even primary activity to be competitive must be capital, and not labour, intensive, the greatest and still growing share of wealth, and all net new employment nationally, is created by service activity (all net new employment in Bridlington we forecast – unless there is an unforeseen inward investment – is also likely to be in services).[7] Cities and towns which grew up in response to industrialisation and primary industry (like fishing and agriculture) have had to find new means of generating wealth and jobs. The towns and cities that have successfully made this transition share in common characteristics that provide something of a guide for those that have yet to do so.

2.9 The central areas of towns and cities have a unique role in this new economy; they are able to offer advantages of concentration and critical mass to knowledge-based and consumer service activity that are unavailable in any other location. They are also the most accessible location for the most people, and therefore the most sustainable location for much of the activity that generates wealth.

2.10 The key to the new post-industrial economy lies in the importance of external economies (scale returns and agglomeration effects) and the importance to their creation of face-to-face contacts. These aspects of economic competitiveness are a direct outcome of, first, the development of a knowledge-based economy and, second, the growth of a consumer society (of which tourism is a major part – although the UK has a negative trade balance in the sector).

2.11 Knowledge, and access to it, are at the heart of successful performance in many parts of the economy – even in seaside towns which must find new means of generating wealth and jobs as their traditional markets shrink and competition even for these grow. As markets have become more complex and changeable, and competition for them greater, product life has become shorter in response, and innovation to create new products has become an ever more important element in achieving profitability.

2.12 Allied to this is the fast-changing pattern of demand on the part of consumers – not least in areas such as the range of consumer goods, but also in leisure and entertainment, tourism and so on. Markets as a consequence have become ever more sensitive to the changing whims of fashion, and this calls for producers of goods and services being able to read the runes both of what is currently in demand and what is likely to be the next trend.

2.13 The need for knowledge is also a function of the out-sourcing of many aspects of the production process – including in the service sector. Whereas, twenty years ago, many firms maintained in-house capacity to cover every aspect of the vertical chains of the production process; now there has been a process of rationalisation, stripping back to core competence, down-sizing and out-sourcing all in the attempt to responds flexibly to rapidly changing markets and create competitive advantage.

[7] As we show in Section 5, we forecast the same for Bridlington.

2.14 The transfer of some risk externally to other firms, has not eliminated the need by procuring businesses to ensure that its suppliers can provide on demand the services needed at various stages of the production process; hence the growth of consultancy firms and the expansion of the whole producer-services sector of the economy – of legal, accountancy and financial services.

2.15 It is the importance of this that underlies the current pre-occupation with economic 'clusters' – that is stimulating economic growth based on the notion of the dense mesh of contacts across firms in related industries, whereby each individual firm gains scale economies as part of an informal complex of interacting – whether inter-trading or competing – business.

2.16 Cities and towns are clearly well placed to capitalise on these trends. Their size, heterogeneity and density of activity means that there is a wider of choice in developing the contact networks that are so important in the competitiveness of firms. And like the firms that move into them to find the scale economies they depend upon, the competitiveness in turn of towns and cities is clearly influenced by the scale returns, agglomeration economies and localised knowledge "spill-overs" they are able to create and support.

The Consumer Society

2.17 The growth of consumerism has been an important stimulus to the development of the knowledge-based economy – but it has obvious additional implications of its own. Tourism, sport, 'high' and 'low' cultural activities have all grown as significant elements of the new national economy.

2.18 The other aspect of increasing affluence (and of the growth of two-earner households) has been the growth in the role of personal services – in part the domestic equivalent of the contracting-out that has been so marked a feature of business. The more affluent (and the busier) a household, the more likely it is to replace many of the functions once performed in the home, by the purchase of paid-for services (e.g., eating out, buying take-aways, employing domestic help), that in turn stimulate the growth of service-related employment.

2.19 Again, towns and cities are well placed to capitalise on these trends, and the more competitive have seen a burgeoning growth in the number of clubs, pubs, restaurants and cinemas that underpin much of popular culture. An intimately related element of this trend is the role that town and city centres play as retailing nodes, especially for high-order goods. Despite the development of out-of-town shopping centres, there are now sufficient instances of town-centre retailing successes to suggest that, if they offer consumers the range of shopping wanted and comfortable and attractive environments in which to do it, they will retain their competitiveness in retailing.

2.20 One of the most consistently growing areas of employment has been in hotels and catering – in part supporting the growth of urban (as opposed to seaside!) tourism, but also the natural corollary of a buoyant retail function.

The Demand Side of Competitiveness

2.21 The most plausible features of the new urban economy would appear to be:

i) Services targeted both on local consumers and "exported" to leisure and business tourists (day-trippers and over-night visitors):

   – high-order retailing, with a mixture of multiples and smaller specialised shops – easily accessed and in an attractive, comfortable and secure environment; and well integrated with
   – entertainment functions - from tourism, to sport and recreation, to culture and entertainment, conferencing etc – and
   – personal services (beauty salons, private health, hairdressers, gyms etc.).

ii) High value-added production with a large knowledge input, selling both locally and to wider regional and national markets;

iii) Business service activity (in law, accountancy, finance etc.) which operate to meet the professional needs of local companies and which also export their services;

iv) A residential community in the central-area to provide both an in-situ labour pool for the producer activity and an in-situ (and often standard-setting) consumer market for the retail, catering and leisure/entertainment functions – and to provide the natural surveillance to keep crime levels down and create the appeal 24 hours a day, seven days a week.

2.22 All of this is much enriched by the spatial concentration that is uniquely possible in town and city centres because of the beneficial externalities: the agglomeration economies that accrue from the easy inter-trading and competition that concentration permits (competition forces the least successful to learn from the more successful), and scale returns, which allow firms easy access to parts of their supplier and customer chains, spawning new businesses keen to take advantage of the opportunities – and so on. The pressure on space drives up property values, making it attractive for investors to supply the property needs of businesses – and so on.

The Supply Side Assets

2.23 There is a large body of academic research on the nature of the assets that help to create competitive places. Most of this work has been based on the correlation between measures of economic outcomes and various contextual "input" elements. Although such relationships are difficult to interpret (because of the same circularity of the causes and effects we note in respect of our methodology), there do appear to be five 'input' elements that are of critical importance to creating a virtuous spiral of economic success:

i) *Skills*: the quality of the workforce is strongly related to economic success, and this applies across the range of educational levels;

ii) *Infrastructure*: good strategic road and rail access, access to international airports and the availability of high-capacity IT networks are seen as being important especially in attracting especially inward investment. Iconic cultural infrastructure can also be an important factor (the Bilbao effect), as can be the local endowment in business support facilities (conference, exhibition) and cultural facilities (museums, galleries, concert halls, theatres).

iii) *Services*: High quality public services are especially important in terms of educational provision. Good schools are a significant factor in encouraging inward migration, especially of younger residents who have or expect to have children - the cohorts (in the age range 20-35) who are not only the most residentially mobile but are also the key age group in the labour force. Higher education institutions are important for labour supply, innovation and business support and spin-out.

iv) *Environment*: the "quality of life factor" is an important element in encouraging both inward investment, in-migration (and population retention) and tourism, including in the business sector. High quality housing, good design, low crime and a well-maintained environment are perceived to be key factors.

v) *Governance*: governance is not merely concerned with the quality of local government, but with the broader elements of strategy and policy. Clearly, much of the business of ensuring high quality in the provision of services is directly in the hands of local authorities – and to this extent, many of the factors above are dependent on the readiness and ability of local authorities to deliver public goods and services. But the two key elements in the wider governance context are partnerships and strategy – including the degree to which there is a realistic strategy developed and "owned" by local stakeholders. In part, this is related to marketing, including the use that has been made of major projects or major events to raise the profile or "repositioned" certain cities –Bilbao's Guggenheim museum is one of the most frequently-quoted cases, but Bridlington could look to successes in seaside towns – Whitehaven and Whitby with their marinas, St Ives with its national art gallery (Rhyl, however, has tried both a theatre and a big, modern indoor pool – but has still continued to lose out to Llandudno, which continues to pip it in the quality of experience it offers, the range of its shopping and its successful management of its seasonal trade so that it does not impinge adversely on local quality of life.)

2.24 Given the experience of the big English cities, and increasingly the more ambitious of the towns and cities in tiers lower down the hierarchy, that have achieved some success in terms of re-inventing themselves and capitalising on the new basis for their economies, there appear to be three key lessons:

- *Developing an agreed strategy* which sets common priorities and brings all partners into the dialogue, so that confidence can be built up in potential investors.
- *Positioning and marketing,* distinguishing the offer and capitalising on the particular competitive advantages of the place as well as servicing core catchment markets.
- *Strengthening partnerships.* The Bridlington Regeneration Partnership is an increasingly strong vehicle for coalescing policy and resources to regenerate Bridlington; more recent moves to work with the Harbour Commissioner and embrace them as partners is a positive and, we would argue, necessary step.

2.25 What, in practice, might all this mean in terms of the strategy for regenerating Bridlington? The evidence suggests that the three most plausible prerequisites for triggering economic and land-use change are:

- enhancing the scale, range, usability and appeal of the town centre to consumers (principally the residents of the catchment – the biggest customer group – but also visitors to the town) – both in retailing (the leading sector) but also leisure in all its forms (culture, restaurants and bars, cinemas etc.);
- encouraging a new residential population in the heart of the town centre; and
- removing the supply-side constraints to creating in the centre of Bridlington a *concentration* of the business and consumer services upon which the major part of Bridlington's future job- and wealth-creation will depend.

2.26 One of Bridlington's greatest challenges is that it has traditionally traded in both tourism and production markets for which there are strong competing pulls. The region's cities – Leeds, Hull and York – trade in the growing urban short break market, and York has international pull as a heritage tourism destination; Bridlington's traditional seaside market is shrinking in the face of strong competition from seaside destinations abroad, which are able to compete on price, weather and accessibility. Although manufacturing and warehouse activity remain important, other locations in the sub-region can compete on price and land availability and are closer to market concentrations. More importantly the competitiveness of this activity necessitates increasing capital intensity; so while these activities will remain important sources of wealth, they will contribute less and less to needed job creation.

2.27 Bridlington has no option but to improve its appeal as a service centre. The implication of this is to base the strategy around all three of the strands suggested above – but taking full account of the necessity to create the spatial concentrations (and inter-mix) of activities in the town centre – and supporting them with good accessibility, and attractive, safe environments. Experience elsewhere suggests that the "easiest" first step is to re-claim consumer spending which is "rightfully" Bridlington's – and we examine this potential in Section 5.

2.28 The next easiest – already underway if a little haltingly – is to attract a new residential population to the town centre – most particularly a combination of young professionals and older, post-children households – both of which have relatively high spending capacity. Attracting new private households can act as an important bolster for changing the local market for consumer activities in the centre. Such an in-situ population has the benefit of establishing a local sub-market for retail trade and a new market for a range of consumer activities – for restaurants, leisure activities and the like.

2.29 More challenging, but also essential, is the creation of a better quality commercial core, that offers the type and quality of workspace and office product that will appeal to the more demanding requirements of competitive, ambitious firms, providing the operating conditions essential to the efficient conduct of business. Property shortcomings, congestion and insufficient parking – made much worse by the seasonal surge of holiday visitors – are all reasons why office and workspace-based employment in the centre has failed to flourish relative to other seaside towns, as we show in the next section.

Seaside Towns

2.30 In historical terms, holiday resorts are a recent invention. The idea that one needed to get away from home to relax, and the means to do so, came with industrialisation and was much boosted, as in Bridlington, by the coming of the railways. The very oldest resorts in the UK are little more than two hundred years old, and most are newer.

2.31 Although a relatively recent innovation, British holiday resorts appear to be past the peak of their popularity. In the early 1970s, English seaside nights represented around 27% of all UK-generated tourism nights. By 1998, the English seaside's share had fallen to just 13%.[8] Cheap air travel and package holidays to areas with a more reliable climate, and a growth in the popularity of other domestic holidays (such as city breaks) are all contributors to this change. There is every sign that this competition will intensify, even if the cheap air travel market is constrained by policy on fuel taxes and airport capacity.

2.32 Concern over the plight of our traditional seaside resorts has prompted a spate of research as the economic challenges become more pressing. The English Tourism Council's 2001 report *Sea Changes* states that "a number of resorts are now facing a range of social problems, such as high levels of unemployment, low income levels, poor levels of education, skills and training and housing problems more associated with those in inner cities."

2.33 Various policy solutions have been proposed. Investment in regeneration initiatives is widespread, although the emphasis has been on ameliorating the symptoms of decline than addressing the structural factors which explain the decline. For example, the research on the Tourism Development Action Programmes in the South West[9] (all of which dealt only with the tourism sector) that developed new attractions and funded training, programmes targeted at improving the quality of accommodation, and marketing, found that little evidence that the effort had stimulated local economic or regional development.[10] This work found that there were two systematic problems being faced by tourism resorts – that of "a general weariness with the mass tourism coastal product" and that tourism in the UK no longer generates the funds to create the continuous and evolving response that required to respond to changing tastes.

[8] P16 English Tourism Council (2001) *Sea Changes*

[9] Agarwal, S (1998) Restructuring and local economic development: implications for seaside resort regeneration in *Southwest Britain Tourism Management 20*

[10] p520 ibid

2.34 The most striking finding of the research is that the economic difficulties experienced by most English resorts have not been accompanied by falling populations (in contrast to the post-industrial decline of urban areas). Work by Sheffield Hallam University found[11] that people have been moving into seaside resorts – and we show in the next section that Bridlington has been no exception. But the research also shows that population growth has been driven by a preference for living near the seaside (just as urban flight has been driven by a preference for living in smaller towns and the countryside), driven in part by migration by the retired and by DSS claimants attracted by the availability of flats (although there are no accurate data to substantiate this). Partly for this reason, jobs have not followed, and those in employment tend to travel out; furthermore, in most seaside towns self-employment rates are high. These factors – affecting the nature and quality of the labour force – have tended to reduce the economic capacity of seaside towns.

2.35 Following concern over the, economic and environmental challenges that coastal towns face the Communities and Local Government Committee started an inquiry to examine current Government policy affecting English coastal towns. They published their report Coastal Towns on 7 March 2007. The report felt a 'one size fits all' approach to coastal towns would be inappropriate given the diversity of coastal towns, however, there are specific areas where they recommended Government needs to act to ensure that coastal towns are not neglected.

2.36 The evidence presented suggests that there are a number of common characteristics shared by many coastal towns. These include:

- physical isolation;
- deprivation levels;
- inward migration of older people;
- high levels of transience;
- outward migration of young people;
- poor quality housing;
- the nature of the coastal economy.

2.37 A number of coastal towns suffer from deprivation and their economic regeneration is of critical importance. Tourism continues to be an important industry in many areas, especially in traditional seaside resorts. However in order for coastal towns to be economically successful there is a role for economic diversification strategies to provide opportunities for local people to work in a range of industries. Official statistics show that the economy of seaside towns is diverse and that the range and trends in job sectors are broadly in line with the national experience, but with some noticeable differences in specific sectors. Official statistics show that the proportion of tourism-related jobs in coastal towns is still higher than the English average: 11.7% compared to an English average of 8.2%.

2.38 Coastal Towns highlights a need to improve the quality of the tourism on offer to attract visitors in an increasingly competitive environment. The Market and Coastal Towns Association highlighted Newquay and its focus on surfing, stating "they have almost invented a USP [unique selling point] for themselves". In Whitstable regeneration of the area has involved successful tourism marketing based around oysters and seafood. Further examples include Southport which has capitalised on golf tourism, Hull with its submarium, know as 'The Deep' and St Ives with the Tate gallery. Coastal towns also have the opportunity to capitalise on the attractiveness of their national environment to draw visitors in. Those towns that have been successful in their development of 'niche' markets and improving tourism tend to be ones where the local community has united behind a common vision for their area.

11 Beatty, Forthergill (2003) The Seaside Economy – The final report of the seaside towns research project Sheffield Hallam University

2.39 The report noted that whilst other than physical exclusion none of these characteristics are unique to coastal towns. Similarly, the evidence to the Committee highlighted some common factors that can contribute to successful regeneration in coastal towns, though these factors are not exclusive to coastal areas. They include:

- location;
- entrepreneurs and the private sector;
- local authorities;
- partnership working;
- buy-in from the local community.

2.40 Accepting the need for structural economic change, the English Tourism Council urges resorts to diversify, stating that it is important that resorts "recognise [the] need for a sustainable and diversified economy…. Tourism alone cannot, therefore, be a regeneration solution for all our resorts. Most will need to diversify their economy to some extent; indeed, some are unable to compete any longer and may need to move away from tourism altogether."

2.41 The question, then, is what makes a seaside town competitive? Work from the London School of Economics[12] points out that collective action by government (including local government) can make a real difference to local competitiveness – but is only likely to be positive if strategies are thought through on a broader, economy-wide basis. This suggests that all competitive strategies must start from an understanding of the prevailing trends in the economy: it is not enough to bolster Bridlington's competitive position in a given market if it is clear that those markets do not offer prospects for growth.

2.42 Moreover, long term strategies for improving prosperity require account to be taken of fast-paced structural change from which Bridlington is not immune:

- continuing structural shifts globally in manufacturing, which makes continued shrinkage of the UK sector virtually unavoidable, intensified by the emergence of increasingly knowledge-based, but still low-wage, centres in Asia and the Far East, coupled with the huge growth potential of China which is also a fast-growing manufacturing base
- changes in the location of IT-based services, with the more labour-intensive services increasingly locating abroad (e.g., call centres in India);
- demographics, which is seeing an aging population emerge as baby boomers move towards retirement age (which offers Bridlington opportunities, provided it can service the consumer needs this more aspirational generation);
- changes in key markets and economic patterns;
- leisure markets, which are very quickly evolving, and increasingly fractured and differentiated;
- retail markets which are an integral part of the broader leisure market, with consumers trading off retail and leisure spending (e.g., substituting a trip to a cinema for a trip to the shops – or often splitting spending between the two on the same leisure trip);
- tourism markets which benefit from rising real incomes but are subject to intensifying competition, and like all leisure markets, subject to rapid shifts in fashion and have, in the UK, been subject to huge international competition.

2.43 How, then, does this research apply to Bridlington? We suggest that a competitive Bridlington needs:

[12] http://www.lse.ac.uk/Depts/london/gemaca.htm

- a diverse economic base which goes with the grain of structural change in the wider economy. Change requires suitable supply-side conditions (labour force, property offer, environment, access etc) and an acceptance that traditional seaside tourism markets have shrunk and are continuing to shrink;
- to maintain and boost its appeal as a place to live, particularly for those in work and those with good disposable incomes. Numerous studies have found that the quality of life and the environment is a major factor in both in-migration and inward investment decisions; for example, Cornwall County Council, 1999, found that 57% of executives surveyed quoted these as the most important factor in relocation decisions. Scottish Natural Heritage, 1997, found that the quality of the scenery in Scotland is an intrinsic element of the package that helps to make Scotland an attractive place for inward investment;
- to ensure that the town offers consumer services that are capable of competing for the major share of the catchments retail and leisure spending, in particular attracts the spending of the better off in the catchment (including shopping, leisure and entertainment and personal services);
- to ensure that the town centre, where the employees and customers will also be customers for the town's other services, is capable of supporting a lively business services sector, meeting the day-to-day support needs (legal, accounting, printing, recruitment services, sales and services of equipment and so on) of the town's production and other service businesses;
- to ensure that the town's core seaside tourism market is not serviced at the expense of the town's own residential and business markets, but instead that this additional spending works to the advantage of the range of services available to the town's residents and businesses, thereby improving overall local quality of life.

Tourism Trends

2.44 *Perspectives on English Tourism*[13] reviews the trends in the tourism industry in the 1990s and finds, in respect of domestic trips (the main source of tourism in Bridlington):

- a large increase in the number of trips to visit friends and relations;
- a movement towards shorter one to three night holidays in England, at the expense of longer holiday trips;
- a growth in trips to towns and cities at the expense of other locations;
- the rise in the number of day trips from home; and
- The rise in the number of business trips.

2.45 The main changes in the trips to the UK by overseas residents are:

- growth in the number of visits to friends and relatives;
- a substantial increase in business tourism; and
- a trend towards independently booked holidays.

2.46 While tourism in England has grown, it has lagged the rise in discretionary consumer income and trips by UK residents taking holidays abroad. The shift to shorter trip-taking reflects longer working hours, stress levels, and consumers having more money but less time. There is also a trend towards multiple holidays of which more than one is the 'main' holiday. Perspectives also notes that:

- customers are increasingly rating 'value for time' as well as value for money, with a trend towards individualism and spiritual and intellectual activity;

[13] Perspectives on English Tourism, English Tourism Council 2000

- age and gender stereotypes are becoming less pronounced;
- within the UK, the 15-24 year old group has a high propensity to travel; the 25-34 year old and 45-54 year old groups are important parts of the inbound market;
- the most important groups taking English holidays are the 35-54 age group with children and the 55 plus group;
- ICT is used increasingly to source information and book holidays; and
- there is competition for tourism spend from home and garden improvements, new cars and electrical goods, fashion etc.

2.47 The competition from near-Europe for the short break market is strong, particularly with the growth in low cost air travel.

2.48 Tourism trips to the seaside grew by 27% in the 10 years to 1999 – less than half the 59% growth in all trip-taking. Holiday trips to the seaside grew by 20%, compared to a 44% growth in trips to small towns, although holiday trips to the seaside remains the single most important destination.

Seaside Tourism

2.49 The seaside still accounts for around a third of British domestic tourism expenditure, but its share of the market has fallen by 50% in the last 25 years; the main seaside visitor market is a relatively old cohort and predominantly C2, D and E. In 1973, English seaside resorts had a 27% share of all trips taken by the British within the UK and abroad; by 1998, the share had fallen to 13%; and is expected to fall to about 10% within the next few years. Nights spent at the English seaside have fallen from 193 million in 1973 to 104 million in 1998. At the same time holidays abroad have risen from eight million in 1973 to 29.25 million in 1998[14].

2.50 English seaside visits are 'down market' compared to other destinations. Significantly, the C2DE group has been shrinking within the UK population.

Table 2.1: All Commercially Accommodated Visits 1998

Location/Socio-economic group	AB	C2/DE
Seaside	2.5 million	7.7 million
Countryside	2.3 million	2.8 million
Town/city	4.1 million	2.6 million

Source: Tomorrow's Tourism or all our Yesteryears

2.51 The response of the English resorts was to try to compete on price; but as profitability has fallen, so has investment and resorts were even less able to compete. As a result many guesthouses and hotels converted to houses of multiple occupation (HMOs), often occupied by vulnerable and disadvantaged members of society. Seaside resorts have also seen in migration by older people seeking to retire in areas where they had spent holidays. Resort centres have also been subject to the impact of out of town shopping centres, as have other towns in the UK.

2.52 Day visits from home and low margin coach tourism has provided a stop-gap measure to help cover costs but have not had enough value to bring the necessary investment.

[14] Sea Changes, English Tourism Council 2001

Tourism in Yorkshire

2.53 In 2002 Yorkshire received 12.2 million staying trips by UK visitors and 0.86 million trips by visitors from overseas, equivalent to 9% of the English domestic market and 4% of the English overseas market. Total visitor expenditure was £1.9 billion, 6% of the English total.

2.54 North Yorkshire is the most visited area within Yorkshire by both UK and overseas residents. The main domestic market is from within the region, followed by the North West. The main overseas markets are the USA and Northern Europe. Holiday tourism makes up two thirds of domestic tourism to Yorkshire and a third of overseas tourism.

2.55 Although overseas residents' trips are strongly skewed towards the third quarter of the year, trips by UK residents are relatively well spread. The homes of friends and relatives are the most common type of accommodation used in Yorkshire, followed by serviced accommodation.

2.56 In addition to the staying visitors, Yorkshire also receives 94 million day visitors from home, with an estimated spend of £2.49 billion.[15] The largest visitor attractions in the region are Flamingo Land and York Minster, both with around 1.5 million visitors per year. None of the big generators of trips is in Bridlington. The Deep in Hull is a newcomer – and generated 750,000 visits in 2002.

Comparative Performance

2.57 Table 2.2 compares the relative performance of Humberside, the wider Yorkshire region and England across a number of measures. The surveys on which the comparisons are based are less than perfect, as there have been significant methodological changes over the time period. However, as these changes are equally applicable to all three geographical areas, relative changes over time are meaningful. The comparisons relate to the changes in the volume of trips and nights by purpose drawn from the British Home Tourism Survey 1980/4 and from the United Kingdom Tourism Survey 2000/2. Both are national surveys designed to measure tourism taken in England by British residents, although the methodology is different.

2.58 Broadly, Humberside has underperformed the rest of the Yorkshire region, and in turn, Yorkshire has underperformed England. This is apparent across all types of trip.

Table 2.2 Changes in tourism in Humberside, Yorkshire and England 1980/4 to 2000/2

	Humberside % Change	Yorkshire % Change	England % Change
		Trips	
Holidays	-10%	39%	34%
Business	-14%	0%	11%
VFR	26%	40%	28%
Other	-62%	-28%	-48%
Total	-4%	31%	26%
		Nights	
Holidays	-31%	-5%	-8%
Business	-28%	-15%	10%
VFR	48%	30%	26%
Other	-37%	20%	-30%
Total	-22%	0%	-2%

Source: BHTS and UKTS

[15] Leisure Day Visits Survey 2002, measuring trips by British residents of 3 hours or more but less than a day for leisure purposes excluding trips made on a regular basis

2.59 Table 2.3 compares changes in the national proportion of different types of trip to the seaside, although this comparison is only available at a regional and national level. It is apparent that Yorkshire seaside trips have been losing market share compared to England as a whole.

Table 2.3 Yorkshire Seaside Trips by Purpose as a % of England Seaside Trips by Purpose

	All Holidays		Short hols		Long hols		Business share		VFR share	
	Trips%	Nights%	Trips%	Nights%	Trips%	Nights%	Trips%	Nights%	Trips%	Nights%
1991	10	9	10	10	10	9	9	7	9	10
1996	10	8	11	11	9	8	12	10	9	8
Minor methodology change										
2001	9	9	10	10	9	9	8	7	10	12
2002	8	8	8	8	8	8	8	6	9	8

2.60 In Sections 3 and 4 which follow, we examine the performance of Bridlington, focusing principally on its economy, but also examining the business space market, the performance of the Spa and Leisure World and the accessibility of the town.

3 THE PERFORMANCE ANALYSIS: BRIDLINGTON'S ECONOMY

Introduction

3.1 This section examines the principal features of Bridlington's economy and asset base, focusing on population structure and change, the structure of the economy and sectoral change in employment demand; the nature of the labour supply; and the tourism market. In Section 4, we make the same assessment of the retail and leisure sector; the business space market and the principal out of town business estates; the access infrastructure; and two of the town's main leisure assets – the Spa and Leisure World. In each case we examine what under-performs and why, and what performs well and why.

3.2 Where data availability permits, we compare Bridlington's performance to that of 10 other seaside towns as part of the effort to understand where and why Bridlington performs as it does, and to identify in what ways Bridlington might emulate the more successful towns. The comparator towns were chosen for a range of reasons, but chiefly to provide something of an indicator, drawing on the most successful, of the 'art of the possible' for Bridlington, what – insofar as it shares the economic circumstances that explain the performance of the more successful – Bridlington might expect to be able to achieve in terms of population growth, employment structure and job creation.

3.3 In Section 5, we look forward and project prospective demand in Bridlington – for employment; tourism spending; retail and leisure spending; business space demand; demand in the markets served by the Spa and Leisure World; and prospective demand for marina berths. In Section 6, we pull together the policy, contextual lessons and performance evidence to summarise the performance analysis and the factors which explain it; identify the assets and other opportunities the evidence suggests offer and conclude with the vision we put forward for Bridlington and the objectives for achieving it.

Population Change and Age Structure

3.4 Bridlington's population[16] is currently (2001 Census) about 37,300, but draws on a wider catchment population of about 64,000.[17] Data are not available to allow us to establish travel to work patterns, although Bridlington has more economically active residents than it has jobs, suggesting that the town is not a net importer of labour.

3.5 Table 3.1 compares population and change between 1991 and 2001 in Bridlington to the other seaside towns we consider. Overall, Bridlington is closest in size to Whitley Bay; its proportion of children (0-15) is most like Scarborough; its proportion of working age (16-64) is closest to Llandudno; and its proportion of retired (65+) is similar to St Ives'.

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[16] Bridlington is defined, for the purposes of this work, as Bridlington Central, South, North and Old Town; we exclude the East Coast and Wolds ward because it is large and predominantly rural – although it contains the Carnaby Industrial Estate which is an important source of work for Bridlington residents. We note the effects of including the ward in the discussion on employment.

[17] The catchment population includes Driffield, and is drawn from a retail study commissioned by the ERYC from England & Lyle that was completed in 2003.

Table 3.1: Population and age structure: Bridlington and the other seaside towns, 1991 and 2001

	Total Population 1991	% 0-15	%16-64	%65+	Total Population 2001	% 0-15	%16-64	% 65+
Bridlington	**35,218**	16.7%	58.4%	24.8%	**37,268**	17.9%	58.2%	23.9%
Folkestone	**41,218**	19.3%	60.7%	19.9%	**45,063**	20.4%	61.8%	17.8%
Llandudno	**18,658**	15.8%	57.0%	27.2%	**20,089**	17.0%	57.2%	25.9%
Morecambe & Heysham	**47,745**	17.8%	59.0%	23.3%	**50,511**	20.1%	59.1%	20.8%
Scarborough	**47,208**	16.9%	59.9%	23.3%	**48,222**	18.0%	60.6%	21.4%
St. Ives	**10,969**	17.6%	59.2%	23.2%	**11,166**	16.3%	60.2%	23.5%
Torquay	**59,584**	17.1%	59.9%	23.0%	**63,996**	18.5%	60.8%	20.8%
Whitby	**13,641**	19.2%	61.3%	19.5%	**13,597**	18.2%	61.9%	19.9%
Whitehaven	**23,288**	21.7%	65.3%	13.1%	**25,081**	20.3%	64.0%	15.7%
Whitley Bay	**37,628**	19.7%	62.2%	18.1%	**38,180**	19.7%	62.2%	18.0%
Whitstable	**29,481**	18.3%	57.3%	24.5%	**30,981**	18.6%	58.6%	22.8%
ERYC	**292,007**	19.0%	63.5%	17.4%	**314,113**	18.8%	62.8%	18.4%
Yorks & H	**4,836,524**	20.4%	63.5%	16.2%	**4,964,833**	20.5%	63.5%	16.1%
Eng. & W	**49,890,277**	20.1%	63.8%	16.1%	**52,041,916**	20.2%	63.9%	16.0%

3.6 In line with most seaside towns, Bridlington has a smaller proportion of working age people (just over 58% in 2001, compared to almost 64% regionally and nationally), and more elderly (24% in 2001, compared to 16% regionally and nationally). Of all the seaside towns, however, only one other – Llandudno – has a smaller share of working age people and only two others – Llandudno and St Ives – have as large or larger share of retired people.

3.7 The most marked, and one of the most important, differences between Bridlington and the rest of the East Riding is the very significantly smaller share of working age people. The proportion of working age population is a significant factor, combined with economic activity rates and qualifications (which we examine below), is the labour supply that the town can most readily draw upon to expand its economy. Other potential must lie in in-migration and commuting (and increasing the rates of economic activity amongst those of working age).

3.8 Table 3.2 also compares population growth between 1991 and 2001 in Bridlington and the other seaside towns, but by change in the principal age cohorts. As the Table shows, the population of every seaside town grew over the period (except Whitby), with rates between 1% and 9%. Bridlington's growth of 6% compares favourably; although lower than the East Riding average of 8%, the town grew twice as fast the region as a whole and three times faster than Scarborough. Amongst the other seaside towns, only five of the other 10 grew as fast as or faster than Bridlington. Overall, Bridlington gained just over 2,000 people between 1991 and 2001.

Table 3.2: Population Change in Bridlington compared to Seaside Towns 1991-2001

	0-15	16-64	65+	Total
Bridlington	13.0%	5.4%	2%	6%
Folkestone	15.3%	11.2%	-2%	9%
Llandudno	15.7%	8.0%	2%	8%
Morecambe & Heysham	19.9%	6.0%	-6%	6%
Scarborough	8.8%	3.4%	-6%	2%
St. Ives	-5.7%	3.5%	3%	2%
Torquay	15.9%	9.0%	-3%	7%
Whitby	-5.5%	0.6%	2%	0%
Whitehaven	1.0%	5.5%	30%	8%
Whitley Bay	1.5%	1.6%	1%	1%
Whitstable	7.1%	7.6%	-2%	5%
ERYC	6.3%	6.3%	14%	8%
Y & H	3.1%	2.6%	2%	3%
Eng & W	4.7%	4.4%	3%	4%

3.9 Table 3.2 also compares population change by age cohort – and shows that Bridlington's proportionate gain in young (0-15) and working age (16-64) people was higher than either the regional and national average – although Folkestone, Llandudno, Torquay and Morecambe experienced higher proportionate gains in both cohorts and lower gains in the older (65+) cohort. Although the 65+ cohort grew in Bridlington, the rate of growth at 2% was very substantially lower than the average for the East Riding as a whole.

Labour Market

3.10 Table 3.3 (in two parts) compares Bridlington to the seaside towns and the borough on a range of labour market indicators using data from the 2001 Census.

Table 3.3, Part 1: Bridlington's Labour Market 2001 Compared to the Seaside Towns

	Bridlington	Driffield	Folkestone	Llandudno	Morecambe	Scarborough	St Ives
Working Age Pop (16-64)	21,695	8,016	27,844	11,481	29,859	29,215	6,724
Economically active	15,113	6,358	21,347	8,415	21,780	22,094	4,820
Economic Activity Rate	70%	79%	77%	73%	73%	76%	72%
Unemployed	1,334	344	1,324	559	1,599	1,427	307
Unemp Rate (U/Econ Active)	8.8%	5.4%	6.2%	6.6%	7.3%	6.5%	6.4%
Self Employed	2,451	809	2,378	1,350	2,483	3,320	1,203
Self Employment Rate	16%	13%	11%	16%	11%	15%	25%
Full Time Employees	68%	75%	77%	72%	73%	72%	66%
Part Time Employees	32%	25%	23%	28%	27%	28%	34%
All Employed	13,779	6,014	20,023	7,856	20,181	20,667	4,513
Employment Rates	91%	95%	94%	93%	93%	94%	94%

Table 3.3, Part 2: Bridlington's Labour Market 2001 Compared to the Seaside Towns

	Bridlington	Torquay	Weston-Super-Mare	Whitby	Whitehaven	Whitley Bay	Whitstable	ERYC
Working Age Population (16-64)	21,695	38,888	43,341	8,419	16,046	23,764	18,167	197,230
Economically active	15,113	29,315	33,081	6,129	11,413	18,285	13,852	152,376
Economic Activity Rate	70%	75%	76%	73%	71%	77%	76%	77%
Unemployed	1,334	1,960	1,420	420	979	789	546	6,936
Unemp Rate (U/Econ Active)	8.8%	6.7%	4.3%	6.9%	8.6%	4.3%	3.9%	4.6%
Self Employed	2,451	5,038	4,113	1,012	792	1,983	2,232	21,387
Self Employment Rate	16%	17%	12%	17%	7%	11%	16%	14%
Full Time Employees	68%	72%	74%	67%	74%	77%	73%	74%
Part Time Employees	32%	28%	26%	33%	26%	23%	27%	26%
All Employed	13,779	27,355	31,661	5,709	10,434	17,496	13,306	145,440
Employment Rates	91%	93%	96%	93%	91%	96%	96%	95%

3.11 Table 3.2 shows that Bridlington has (in round numbers) 21,700 people of working age, compared to 23,700 in Whitley Bay, the town it is closest to in overall size. But because Bridlington has the lowest economic participation rate of all the seaside towns – just 70% compared to an average for the seaside towns together of 75% – Bridlington has just 15,100 economically active (21% fewer than Whitley Bay, compared to an overall population that is just 2% smaller than Whitley Bay's).

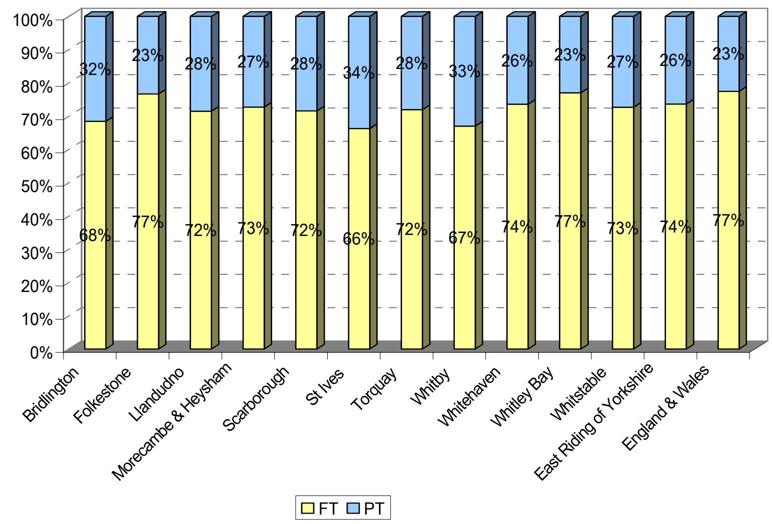
3.12 Bridlington's unemployment rate (calculated as the number of claimants as a proportion of the economically active) is also very high at 8.8%. Only Whitehaven comes close at 8.6%, and Whitehaven has long been an under-performing economy (the result of the closure of the coal mining industry) and a long term object of regeneration efforts (including, comparatively recently, a £44 million marina). Bridlington's high unemployment rate is part of the explanation for the low economic participation rate; the lack of pressure on the labour (and typically low pay for easy entry work) reduces the incentives for joining the labour market. We show below that the incidence of permanent illness and disability in Bridlington is not out of step with the other seaside towns.

3.13 Self-employment (insofar as people are accurate in responding the census and do not hide whether they work, but in the black economy) in Bridlington is comparatively high at 16%, even for seaside towns where, for those considered, the overall average is 14%. Self-employment is, to a certain extent an indicator of entrepreneurialism, but high rates are also indicative of low-ish employee demand (and tend always to be high in rural areas, which is one reason why the rates are high for the East Riding as a whole). The regional average is 10.5%.

3.14 The overall employment rate – in line with the high unemployment rate – is low in Bridlington, even by seaside town standards. But most importantly, the evidence shows that Bridlington has too few jobs to support even its economically active – and before account is taken of the low rates of economic engagement. The labour market is imbalanced to the tune of some 1,400 jobs (for full employment; or 700 jobs if unemployment were to fall by half to 4.4%, still higher than the regional average. If the economic activity rate were to reach the seaside town average of 75%, the jobs gap would be (on census figures) closer to 1,900 (assuming a 4.4% unemployment rate; or 2,600 jobs assuming full employment).

3.15 Figure 3.1 compares, in chart form, the full- and part-time employments rates in Bridlington and the other seaside towns.

Figure 3.1: Full and Part-time Employment 2001 (Census)

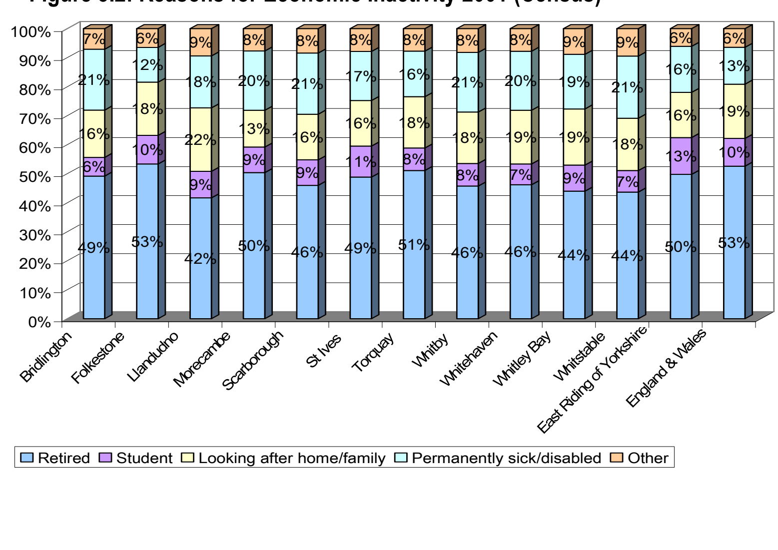


3.16 Of those in employment in Bridlington, just over two-thirds (68%) are in full time work – again low even by seaside town standards. Only Whitby and St Ives have as small a share of full-time jobs. The corollary – a high level of part time employment – is also true; a third of jobs in Bridlington, Whitby and St Ives are part-time. Thus not only is Bridlington short of jobs, too many of those it does support are part-time.

3.17 High levels of part-time work, high unemployment and low levels of economic engagement suggest high levels of benefit dependency and comparatively low average levels of disposable income and spending power (although as we show below, home ownership without a mortgage is also high in Bridlington, suggesting the retired contribute disproportionately to the population's spending power).

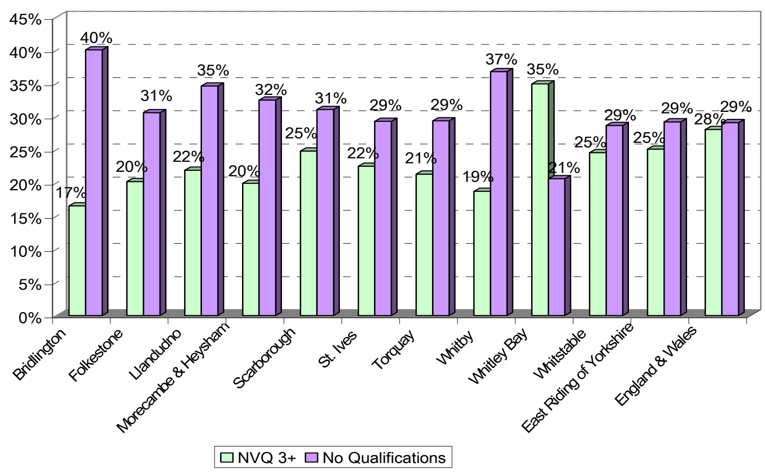
3.18 Figure 3.2 compares the reasons for economic inactivity in Bridlington to the rest of the seaside towns. The principal difference between Bridlington and the other seaside towns is the comparatively small proportion of economically inactive students. The proportion who are permanently sick or disabled is not much higher than other seaside towns. Although the proportion of retired is 49%, this is not high by regional, national or seaside town averages.

Figure 3.2: Reasons for Economic Inactivity 2001 (Census)



3.19 Figure 3.3 compares educational qualifications in Bridlington and the other seaside towns.

Figure 3.3 Educational Qualifications: 2001 (Census)



3.20 A higher proportion of Bridlington's population has no qualifications compared to all of the seaside towns, and fewer have qualifications to NVQ3 or higher; only Whitby performs nearly as poorly. The difference between Bridlington and the rest of the East Riding is particularly stark. The explanation lies partly in the nature of local employment (a cause as well as an effect) and partly in schools performance, but would appear additionally to reflect the popularity of the town as a place to live by the benefit dependent.

3.21 More contentiously, but nonetheless a factor, is schools performance. Table 3.4 compares the 'value-added' achieved by Bridlington's schools measured by GCSE and GNVQ scores (based on students best eight marks), to schools in Scarborough, Whitby, the rest of ERYC and England. The value-added measure attempts to discount the effect on scores of such factors as socio-economic groupings. Nonetheless, comparing Bridlington's secondary schools on the same basis as those in the other towns suggests Bridlington's schools perform less well and achieve poorer results (although not very different from Scarborough's). Clearly, good schools are an important factor in determining the quality of the workforce and encouraging in-migration amongst families (most particularly those with choices of where to live), and we understand that there is a major push underway to improve local schools

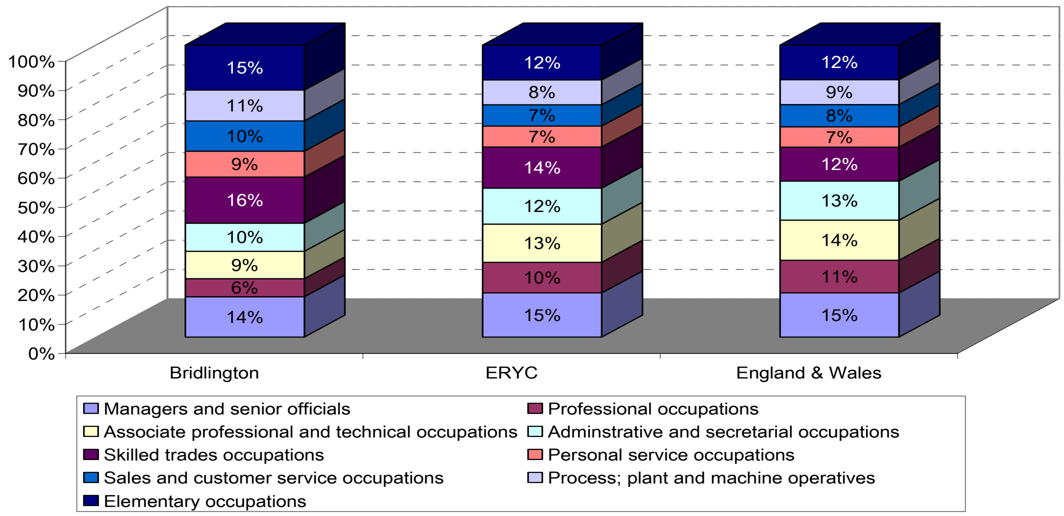
Table 3.4: GCSE Results for Schools in Yorkshire reas

	Percentage of students getting 5+ A*-C at GCSE	
	1997	2006
Bridlington -North	44.7	58.8
-South	29.1	38.3
Whitby - Community College	47.9	59.9
Scarborough District	45.1	55.9
North Yorks LEA Average	54.0	64.5
ERYC LEA Average	44.3	62.2
England Average	45.1	59.2

Source: DfES performance tables http://www.dfes.gov.uk

3.22 Figure 3.4 compares the occupation structure of Bridlington's residents to residents of the East Riding as a whole and to England and Wales.

Figure 3.4 Occupation Structure of Residents 2001 (Census)



3.23 As expected given the other characteristics of the labour force, the occupation structure of Bridlington's residents is skewed towards the less skilled. While 25% of residents of the East Riding as a whole (and 26% in England and Wales) are in professional and managerial occupations, just 20% of Bridlington's residents are. Similarly, 9% of Bridlington's residents, but 13% in the East Riding and 14% in England and Wales, are in associate professional and technical occupations. More of Bridlington's residents are in skilled trades (16% compared to 14% in the East Riding) – and very significantly more, at 45%, are in sales, customer service, personal service and elementary occupations, than in the East Riding and England and Wales (both have 36%).

3.24 The occupational structure of Bridlington is different to that of the workplace-based occupational structure, as we show below. Although there are still fewer professional and managerial jobs in Bridlington than in the East Riding as a whole, the difference is small – suggesting that the more skilled, knowledge-based jobs are filled by commuters.

Employment

3.25 Table 3.5 summarises employee employment in Bridlington between 1991 and 2005 (the latest data available). In 2005, there were 9,800 employee jobs in the town, 2% more than in 1991 (equivalent to 200 jobs). Bridlington's rate of job growth was modest by regional and national standards (as we show below), nor did it keep pace with the growth in the working age population (a gain of 5.4% between 1991 and 2001), helping to explain the persistently high rate of unemployment.

3.26 There were also marked sectoral changes in Bridlington over the 1991-2005 period. Primary and manufacturing employment fell sharply, as did employment in transport and communications; these three sectors together lost a total of some 600 jobs over this period. Employment in distribution, hotels and catering, public administration and other services, however, all grew strongly – and added, gross, 900 jobs to the economy.

3.27 The strongest percentage growth in employment was in 'construction', and the largest absolute growth was in public administration, education & health. The single greatest contributor to employment in retailing is employment in supermarkets. Both the distribution (retail) and hotels and catering sectors have large shares of part-time employment.

Table 3.5 Employee Employment in Bridlington 1991-2005

					Change 1991-2005	
	1991	**1997**	**2002**	**2005**	**Nos.**	**%**
Agriculture and Fishing	100	100	0	0	-100	-100%
Energy and Water	100	100	100	100	0	0%
Manufacturing	1,000	1,000	700	700	-300	-30%
Construction	300	300	300	500	200	67%
Distribution, Hotels and Restaurants	3,100	3,300	3,700	3,300	100	3%
Transport and Communications	400	300	200	200	-200	-50%
Banking, Finance and Insurance	900	700	900	600	-300	-33%
Public administration, Education and Health	3,300	2,900	3,600	4,000	700	21%
Other Services	400	700	500	500	100	25%
Total	9,600	9,300	10,100	9,800	200	2%

Source: AES/ABI (NOMIS)

3.28 Most notably, and In contrast to trends regionally and nationally (shown in Table 3.7), Bridlington lost jobs in financial and business services – a major driver of job creation and wealth in the country.

Employee Employment including Carnaby

3.29 Table 3.6 shows the effect on the employment figures for Bridlington if the East Wolds and Coastal ward, where the Carnaby industrial estate is located, is included in the figures. The effect is to increase the overall job total by some 5,000 jobs (equivalent to increasing the size of the area by some 43%). The greatest difference is the effect on the share of total employment accounted by manufacturing – from 7% of jobs (in the better definition of Bridlington's employment base), to 16% (although, clearly, Bridlington's residents have access to jobs in the ward). Not all of these additional manufacturing jobs, however, will be located on the Carnaby estate (which contains a mix of production, repair and distribution jobs).

Table 3.6 Bridlington plus the East Wolds and Coastal Ward: 2005

Employee Employment 2005	**Brid**	**Brid %**	**East Wolds and Coastal**	**Brid + East Wolds and Coastal**	**Brid + East Wolds and Coastal %**
1 : Agriculture and fishing	0	0%	0	100	1%
2 : Energy and water	100	1%	0	100	1%
3 : Manufacturing	700	7%	1,500	2,300	16%
4 : Construction	500	5%	600	1,100	7%
5 : Distribution, hotels and restaurants	3,300	34%	1,200	4,500	30%
6 : Transport and communications	200	2%	200	400	3%
7 : Banking, finance and insurance, etc	600	6%	600	1,200	8%
8 : Public administration, education & health	4,000	41%	600	4,500	30%
9 : Other services	500	5%	200	700	5%
Total	**9,800**	**100%**	**5,000**	**14,800**	**100%**

Employment in Bridlington Compared to the Seaside Towns

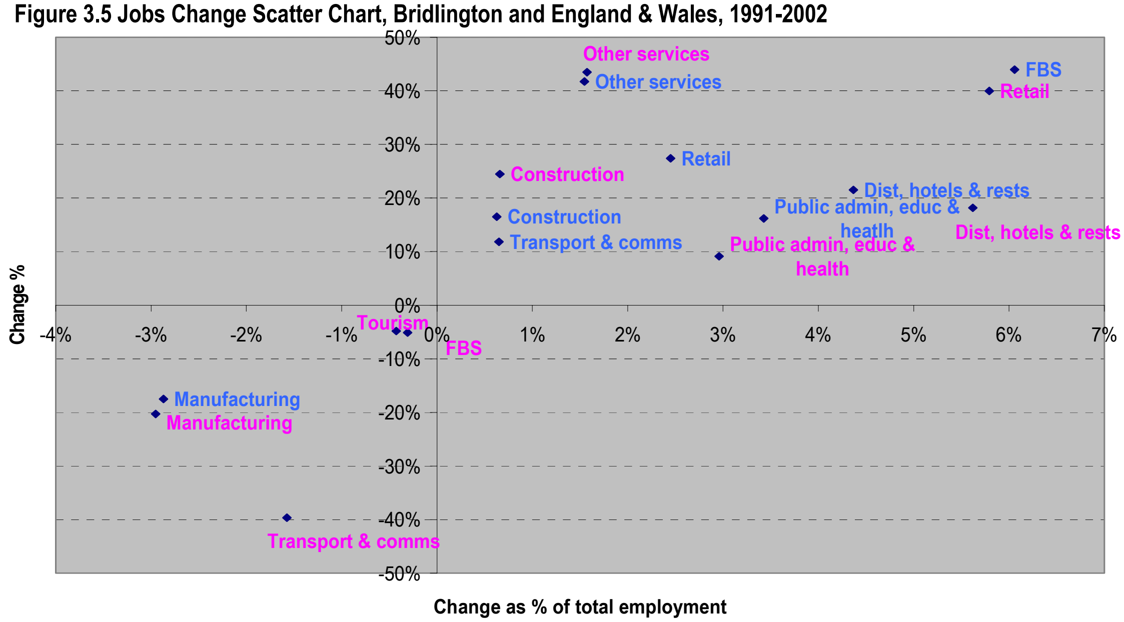
3.30 Table 3.7 compares employment change in Bridlington by sector between 1991 and 2005 to employment change regionally and nationally. The comparisons show very clearly the extent of Bridlington's underperformance. Overall, employment in Bridlington grew at just half the regional rate and only one-third of the national rate.

Table 3.7: Employment Change in Bridlington, ERYC and England 1991-2005

		Agriculture and fishing	Energy and water	Manufacturing	Construction	Dist, hotels & rests	Transport and communications	Banking, finance and insurance, etc	Public administration,education & health	Other services	Total
2005	Brid	0	100	700	500	3,300	200	600	4,000	500	9,900
	Y&H	16,200	11,700	312,900	114,800	543,700	134,700	386,000	637,100	105,300	2,262,400
	Eng '000s	200	100	2,700	1,100	5,900	1,500	5,100	6,400	1,200	24,200
1991	Brid	100	100	1,000	300	3,100	400	900	3,300	400	9,600
	Y&H	25,600	47,400	427,100	98,100	452,000	102,800	236,200	463,300	73,000	1,925,500
	Eng '000s	300	300	3,600	800	4,500	1,200	3,100	4,600	800	19,200
Change	Brid	-100	-100	-300	200	100	-200	-300	700	100	100
	Y&H	-9,400	-35,700	-114,200	16,600	91,600	31,900	149,800	173,700	32,300	336,600
	Eng '000s	-100	-200	-900	200	1,400	200	1,900	1,800	400	4,700
% Change	Brid	-100%	-100%	-30%	67%	3%	-50%	-33%	21%	25%	1%
	Y&H	-37%	-75%	-27%	17%	20%	31%	63%	37%	44%	17%
	Eng	-33%	-67%	-25%	25%	31%	17%	61%	39%	50%	24%

3.31 Again, the overall average masks marked differences in sectoral patterns. Manufacturing employment fell more sharply in Bridlington (almost twice as fast as regionally and nationally); employment in transportation and communications grew regionally and nationally but contracted in Bridlington; and employment in financial and business services contracted marginally in Bridlington but was the fastest growing sector in the region and in England. Employment in distribution, hotels and catering and other services grew at a similar rate in Bridlington as it did regionally and nationally. Employment in public administration, education and health grew in Bridlington, but at a much slower rate than elsewhere.

Figure 3.5 Jobs Change Scatter Chart, Bridlington and England & Wales, 1991-2002



Pink = Bridlington, Blue = England & Wales; Source: ABI 2002, AES 1991 reconciled

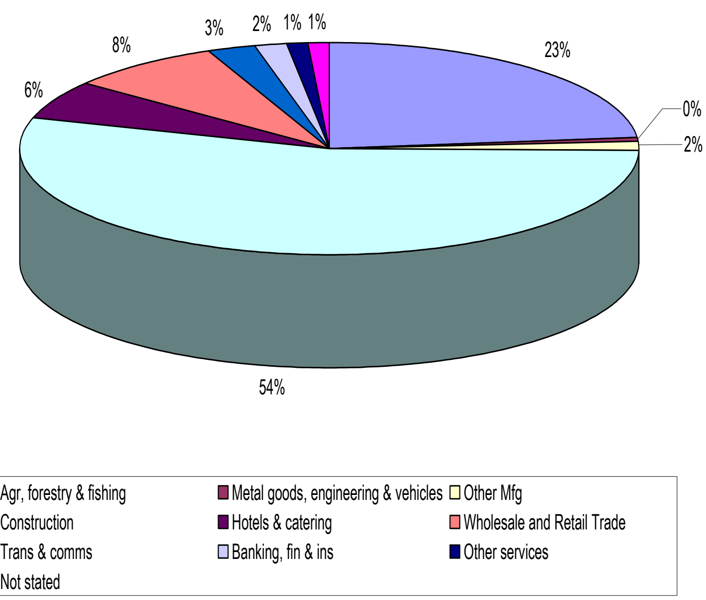
3.32 Figure 3.5 summarises the data presented in the previous tables in the form of a scatter diagram that illustrates the differential between Bridlington's performance by sector against the national average. The X-axis shows change over the 1991-2002 period, and the Y axis shows the change in the number of jobs in the sector as a proportion of total jobs in the area, and illustrates the relative size of the change. The sectors that had a large change in the number of jobs – upwards or downward – will constitute a larger proportion of the total jobs figures. The top right hand segment signifies the sectors that have grown since 1991; and the bottom left shows the sectors that have declined.

3.33 Although retailing grew faster in Bridlington than the national average and represents a higher proportion of jobs, detailed evidence (4 digit classification) shows that this growth was concentrated in supermarkets. (Bridlington as we show below has fewer retail jobs per 1,000 population than the other seaside towns, which puts the data in Figure 3.5 in proper perspective).

3.34 Figure 3.6 shows our estimate of the structure of self employment in Bridlington in 2002; because the data are not yet available from the 2001 Census, we have taken the 1991 Census structure (which is for residents) and applied it to the 2002 self-employment numbers to approximate the distribution of self employment by industry.

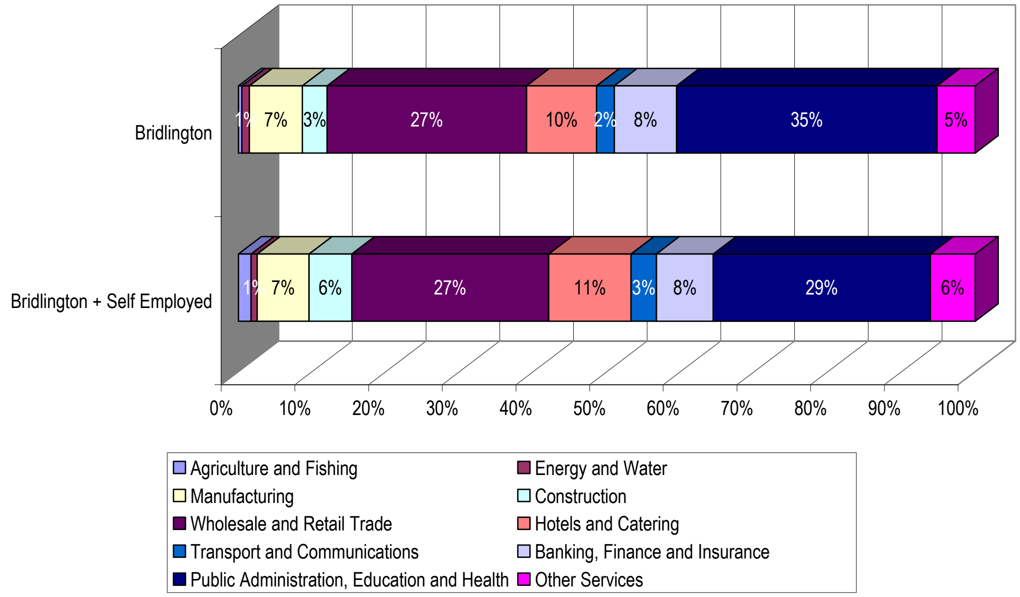
3.35 As Figure 3.6 shows, the major share of self-employed are in construction, fishing and hotels, catering, restaurants and distribution; these sectors together (on the 1991 assumptions) would appear to account for 91% of all self employment in Bridlington.

Figure 3.6: Self-employment in Bridlington by Industry Structure 2002
(applying 1991Census structure to 2002 self-employment numbers)



3.36 The effect on Bridlington's economic structure of adding the self-employed to employee numbers is shown in Figure 3.7. The inclusion of self-employment has, as the figure shows, little effect on the structure. The distribution, hotels and catering sector accounts for 37% per cent of all employment excluding the self employed, and for 38% if the self-employed are included. More significant is the impact on the relative importance of public sector employment, which falls from 35% of employee jobs to 29% of all employment. Although construction remains a small share of the total, it rises from 3% of employee jobs to 6% of all employment.

Figure 3.7: Bridlington's Employment Structure, including and excluding Self-employed 2002



Employment in Bridlington Compared to the other Seaside Towns

3.37 Table 3.8 below compares employment change in Bridlington between 1991 and 2002 to employment change in the other seaside towns. Employment in Whitehaven (attributable to loss of primary and process jobs) fell by 19%, although it grew everywhere else but by sharply different rates. Employment in Bridlington, Llandudno and Whitley Bay all grew by 5% or less overall – in contrast to 8% growth in Scarborough (which compares to the regional growth rate over the period), 10% in Folkestone, 23-23% in South West towns of Weston-super-Mare and St Ives, and 65% in the South East town of Whitstable. In the towns with rapidly growing employment, the major contributors (proportionately and in absolute numbers) were financial and business services and distribution, hotels and catering. Bridlington performed poorly in the former, and about average for the towns in the latter.

Table 3.8: Employment Change in Bridlington and the other Seaside Towns 1991-2002

Employment Change 1991-2002	Bridlington	Folkestone	Llandudno	Morecambe & Heysham	Scarborough	St. Ives	Torquay	Weston-Super-Mare	Whitby	Whitehaven	Whitley Bay	Whitstable
Manufacturing	-29%	-18%	45%	8%	48%	16%	-3%	-24%	0%	-74%	-3%	26%
Construction	24%	-61%	-43%	42%	-15%	287%	83%	-11%	43%	4%	-29%	89%
Distribution, Hotels and Restaurants	18%	14%	5%	-1%	12%	10%	3%	34%	29%	-7%	-3%	58%
Trans. & Communic.	-40%	47%	-4%	5%	-21%	-40%	17%	40%	-39%	-70%	-59%	25%
Banking, Fin. & Ins.	-5%	18%	-21%	13%	28%	26%	2%	79%	-5%	-18%	-24%	73%
Pub Ad, Educ & Health	9%	13%	15%	31%	-3%	63%	4%	15%	8%	13%	29%	98%
Other Services	43%	102%	-8%	-3%	1%	44%	105%	21%	-22%	7%	-10%	168%
Total	5%	10%	4%	7%	8%	23%	8%	22%	10%	-19%	2%	65%

Source: AES, ABI rescaled

Employment in the Key Town Centre and Tourism Sectors

3.38 In the following sets of tables we compare Bridlington's employment structure to that of the other seaside towns. Rather than use proportions of jobs in individual sectors as the comparator, we use for this purpose the better comparator of the number of jobs per 1,000 population (removing the distortion caused by structural differences in the economies). We focus on the sectors which are both the major sources of job creation nationally and those most closely related to town centre activity and tourism. Manufacturing employment, for example, is of considerably less interest as it is very unlikely to be a source of future job growth for Bridlington (there may be important and valuable gross gains, but net gains in manufacturing employment are unlikely).

Retail Jobs

Table 3.7: Retail Jobs per 1000 Population

	Retail Jobs per 1000 pop
Llandudno	142
Whitby	83
Scarborough	81
Whitehaven	69
Folkestone	69
Torquay	62
Bridlington	55
Morecambe & Heysham	52
St. Ives	50
Whitstable	48
Whitley Bay	40

Source: ABI 2002 (employment), Census 2001 (population)

3.39 Table 3.7 shows the number of retail jobs per 1,000 population in Bridlington compared to the other seaside towns. In contrast to the disproportionately high share of retail jobs compared to national averages, Bridlington is about mid-league compared to the other seaside towns. Llandudno has almost three times as many retail jobs per 1000 population, but it is a sub-regional shopping centre for north Wales. Scarborough is a better comparator in the sense that it shows its relatively greater strength as a shopping (and tourism) destination, but also provides an indicator of what Bridlington might reasonably aspire to (as we show below, Bridlington underperforms as a shopping centre and there is substantial scope for improving its appeal to its catchment, as well as to visitors).

Jobs in Other Services

3.40 Table 3.8 shows the number of jobs in Bridlington per thousand population in ‘other services’ – a mixed but important sector for Bridlington, as it contains a significant proportion of the professional service, cultural and recreational activities that are important to local quality of life and to the tourism economy. It is also a sector that has grown sharply in Bridlington, although it accounts for just 5% of total employee employment (6% if the self-employed are included), a marginally higher share than the national average.

3.41 Compared to jobs in ‘other services’ in the comparator seaside towns, however, Bridlington is at the bottom of the league table (alongside Whitby and Whitley Bay), with 14 jobs per 1,000 population. Torquay and Scarborough proportionately have almost twice as many jobs in the sector – and, as in the retail sector, suggests a something of target for Bridlington to emulate, most particularly as other service activity is forecast to continue to grow rapidly nationally (and in Bridlington – as we show in Section 4).

Table 3.8 Employment in Other Services 2002 per 1,000 Population[18]

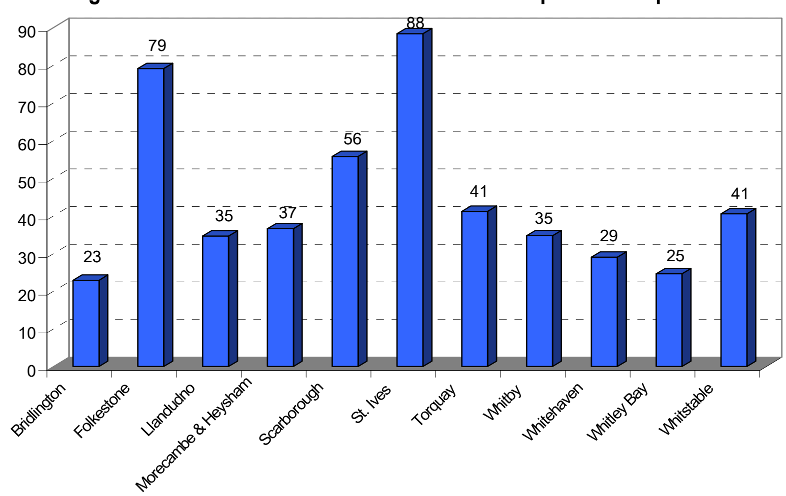
	Other Services per 1,000 pop
Torquay	27
Scarborough	27
Folkestone	24
Whitstable	23
Llandudno	23
Whitehaven	22
Morecambe & Heysham	20
Weston-Super-Mare	19
St. Ives	18
Whitby	14
Bridlington	14
Whitley Bay	14

Source: ABI 2002 (employment), Census 2001 (population)

Financial and Business Services

3.42 Figure 3.8 shows the same comparison for jobs in financial and business services – our approximation of office-based jobs in Bridlington.[19]

Figure 3.8 Financial and Business Service Jobs per 1000 Population



Source: ABI 2002 (employment), Census 2001 (population)

3.43 Bridlington is again at the bottom of the seaside town league, with 23 financial and business service jobs per 1,000 population (again alongside Whitley Bay, though Whitehaven is also a poor performer). Scarborough has, proportionately, more than twice as many such jobs as Bridlington – and again is indicative of what should be feasible for the town. The sector is particularly important because it attracts the better qualified, pays better, supports office-based activity and has a higher multiplier value.

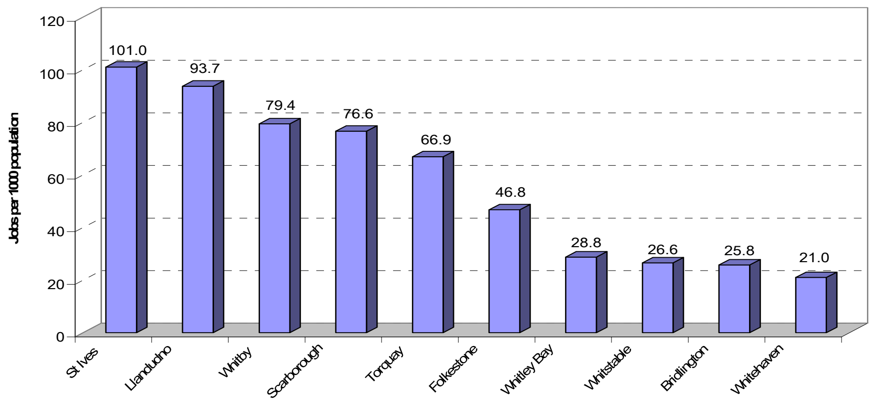
[18] Other services includes sewage and refuse disposal; activities of professional, business and other membership organisations; recreational, sport and cultural activities (including film, video, radio and television), theatrical activities, other entertainment (theme parks etc), museums and libraries; sporting activities; dry-cleaning; hairdressing; health and fitness activities; and funeral and related activities

[19] Financial and business services are the industry benchmark for estimating the need for office space; although not all jobs in the sector are accommodated in offices, and there are jobs in the other sectors which are in offices, financial and business services is the best approximation the data permit.

Hotels, Catering and Restaurants

3.44 Figure 3.9 makes the same comparison for jobs in the hotels, catering and restaurant sector.

Figure 3.9: Jobs in Hotels, Catering and Restaurants per 1000 Population 2002



Source: ABI 2002 (employment), Census 2001 (population)

3.45 As with the other town centre and tourism sectors, Bridlington is near to the bottom of the league. St Ives – probably the strongest of the comparators as a holiday destination and desirable 'lifestyle' location – has almost four times as many (Whitstable, surprisingly, has no more than Bridlington – although the findings for Whitley Bay and Whitehaven are consistent with the other findings).

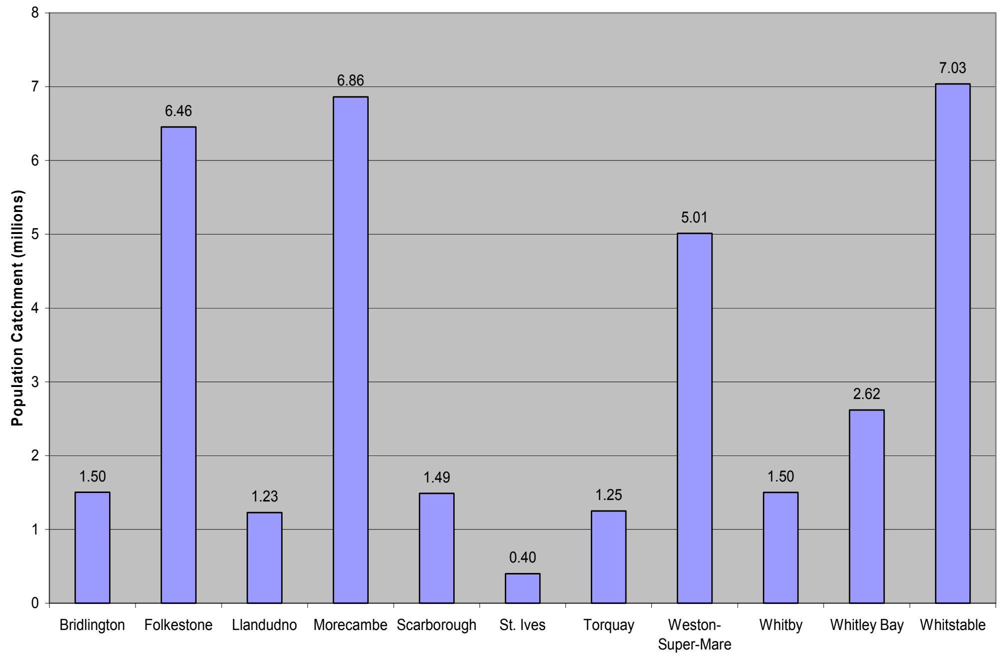
3.46 Again, Scarborough does markedly better than Bridlington with close to three times as many jobs in the sector – and on this measure too would appear to provide something of a guide to Bridlington's potential.

Day Trip Catchment Area Drive Times

3.47 In the discussion below on the tourism economy, we show that Bridlington generates close to the same spend from its day trippers as its does from its overnight stay visitors, and is clearly highly dependent on its daytrip appeal. In general, although people are typically willing to drive further to the seaside, the research evidence on tourism shows that on average some three-quarters of all day trips originate from within an hour and half's drive of the destination. As Figure 3.10 shows the size of Bridlington's 1.5 hour drive time catchment is considerably smaller than that of many of the comparator seaside towns. Scarborough's, however, is little different and overlap's with Bridlington's. Although the daytrip catchment for Llandudno, St Ives and Torquay is smaller even than Bridlington's both are close to other holiday locations and benefit from this cluster value (which could suggest that Bridlington would benefit from aligning forces with Scarborough).

3.48 Despite people's willingness to travel longer to visit the sea, Bridlington is clearly disadvantaged by the day trip catchment it has easy access to. Moreover, there are three cities within this catchement – plus other resorts (most particularly Scarborough, but also Filey) and beaches – that compete for day trippers.

Figure 3.10: Population within 1.5 Hours' Drive



Summary – Bridlington's Performance in the Key Town Centre and Tourism Sectors

3.49 Measured by employment in the sectors which are the most important indicators of Bridlington's ability to capture catchment and tourism spending in order to support local employment, Bridlington does not compare well to the other seaside towns. While there may be quibbles with the data, the fact is that we have compared Bridlington to the other towns using exactly the same data. The results are unequivocal. Bridlington underperforms in exactly the sectors it needs to be strong in: these sectors are the major sources of job creation in the economy; they are the mainstay of the town centre, including in the office sector; and they are the core of the tourism market.

Tourism Employee Jobs – Measured on the SWRDA Definition

3.50 The South West Regional Development Agency defines tourism in such a way as to exclude from the measure activities – such as retailing – where the main source of spending is from residents.[20] They do this to enable them to monitor (as closely as standard industrial classifications and the Annual Business Inquiry data will permit) the performance of the tourism economy as distinct from other economic activities. We compare tourism jobs per 1000 population using this measure in Bridlington with tourism jobs per 1000 population in the other seaside towns in Table 3.10.

[20] The SWRDA definition includes: hotels and motels with and without restaurants; youth hostels and mountain refuges; camping and caravan sites; other lodging; activities of travel agents; artistic and literary creation; operation of arts facilities; fair and amusement park activities; museum activities; botanical and zoological activities; museum activities; operation of sports arenas and stadiums; other sporting activities; gambling and better activities and other recreational activities not otherwise classified.

Table 3.10: Tourism Jobs per 1,000 head of population, 2005, SWRDA Definition

	Tourism Job per 1000 Pop
Llandudno	94
St Yves	56
Torquay	47
Scarborough	44
Whitby	42
Folkestone	34
Whitley Bay	20
bridlington	15
Whitehaven	13
Whistable	13
Morecambe & Heysham	11

Source: ABI 2005, Census 2001

3.51 Again – not surprisingly given its sectoral performance – Bridlington is towards the bottom of the league table. The stronger economies – generally as well as in tourism – are towards the middle and top of the table.

3.52 In absolute numbers, the SWRDA definition suggests that about 560 people are employed in tourism activities in Bridlington – about 6% of all employee jobs. The ABI data, however, are based on sample information collected in December, and thus underestimate actual numbers. Our detailed research on the tourism economy suggests that the actual dependency on tourism for jobs is rather higher (we estimate about 2,150 full, part–time and seasonal jobs, equivalent to about 16% of all jobs, employees plus self-employed in the town). Because of difficulties with both data sets, we suspect that the 'truth' probably lies somewhere in between.

3.53 Table 3.11 compares the change in the importance of tourism as a source of jobs in 1991and 2005 in Bridlington and the other seaside towns.

Table 3.11: Shares of Total Employment Accounted by Tourism Jobs, 1991 & 2005

(SWRDA Definition)

	% of Total Jobs 1991	**% of Total Jobs 2005**
Bridlington	6.40%	5.7%
Folkestone	6.50%	7.9%
Llandudno	19.20%	17.6%
Morecambe	8.70%	3.1%
Scarborough	11.20%	9.4%
St Ives	22.80%	14.5%
Torquay	16.30%	11.0%
Whitby	9.60%	10.6%
Whitehaven	2.20%	3.6%
Whitley Bay	7.10%	5.0%
Whitstable	2.70%	4.3%

Source: AES 1991; ABI 2005

3.54 In Bridlington, as in every other seaside town except Folkestone, Whitehaven and Whitstable, tourism as a source of employment (on the SWRDA definition) has declined in relative importance – and in some cases very substantially (Morecambe, St Ives, Llandudno).

3.55 Whatever the actual absolute number of jobs is that are dependent on tourism spending, the comparative evidence is clear. Bridlington has less of its economy in the sector than most of the other seaside towns. This could be a strength – but at present, and against the other evidence, it is clearly not because Bridlington has yet to make up for the decline in the proportion of its economy that has been dependent on tourism with jobs in other sectors.

3.56 The question, however, is why this should be the case. We address these explanations fully in Section 5, but note here that the most important of the 'headline' causes (meaning that there are underlying explanatory factors for these headline causes) are: the failure of the town centre to keep pace with the needs of its resident catchment (business and consumer); the failure to diversify in the visitor sector to offset the effects of the low spend, high volume, but shrinking, traditional seaside holiday market; and the failure to diversify the economy more generally. The three factors are interdependent: the narrow appeal of the town centre retail and leisure offer diminishes the town's ability to diversify its tourism market, and the lack of a sufficient critical mass of higher spending catchment customers and tourists has, in turn, deterred the risk investment needed to develop (or locate in the town centre) other activities, including office-based services and new hotel accommodation.

Bridlington's Tourism Economy

3.57 We summarise here our more detailed examination of the performance of Bridlington's tourism economy set out in the separate tourism report. We carried out this work in recognition of the fact that the Office of National Statistics data are less good at picking up on the informal economy and because one of the principal explanatory factors for the underperformance of Bridlington's economy is its declining competitiveness as a tourism destination. While we argue that Bridlington's future lies primarily in doing better by its catchment (the businesses as well as the residents) population, tourism will remain an important sector and Bridlington needs to improve its competitiveness in this market too.

3.58 Most of the evidence we cite is drawn from a survey of accommodation and attractions in Bridlington that we undertook for this study; we used this survey to help calibrate the Cambridge local area tourism statistics model for Bridlington (alongside a series of adjustments we have made to the published regional tourism totals to account for local factors). The full tourism report sets out the assumptions that went into the model, the workings of the model and the detailed results. We concentrate here on the principal findings of the performance element of the work. In Section 5, alongside our other demand work, we set out our forecasts of the future earning potential from tourism.

Bridlington Visitor Characteristics and Attitudes

3.59 Analysis of the research on those receiving the Bridlington Guide and the survey work on visitors to Bridlington[21] indicates that:

- Bridlington's main markets are older people and families with children. Young adults are not drawn to the resort;
- the pattern of visits is seasonal;
- competitor destinations are North Yorkshire, Devon, Lancashire and Norfolk;
- the main visitor origin areas are Yorkshire and the ex-Humberside;
- the visitor profile is skewed in favour of skilled workers, less prosperous older people and council estate residents;

[21] Bridlington Conversion Analysis 2003, Acorn & Geographical Analysis for Bridlington 2003, Destination Benchmarking Survey 2000, Bridlington Market Research Questionnaire 2003. These studies are reviewed in more detail in the appendix

- compared to other resorts, Bridlington has considerably more C1s and considerably fewer A/Bs; and
- in comparison with other destination types, visitors consider Bridlington to:
  - be slightly less enjoyable to visit than other resorts, but more likely to be recommended to other people
  - have a more restricted range of attractions
  - have a better than average choice of places to eat and drink
  - have a poorer range of shops and a worse than average shopping environment
  - have less to do in the evening than other destinations
  - have better than average toilets
  - have a cleaner sea and beach environment.

3.60 Bridlington's particular strengths were judged to be the beach and that the resort was flat and good for walking. Fewer people were able to specify weaknesses but those that did mentioned dog fouling and litter.

3.61 Bridlington has a lower proportion of day visitors, probably because of the relative distance from major conurbations to Bridlington. Bridlington also has a much lower proportion of first time visitors than the all resorts average.

3.62 A higher proportion of Bridlington's visitors stay in static caravans, including privately owned and rented caravans. There is also a higher proportion using touring caravans. The corollary is that a small share of Bridlington's visitors stays either in serviced accommodation or with friends and relatives.

3.63 The analysis of the Bridlington Guide suggests that it is used by regular summer visitors – and contributes little to attracting new visitors or spreading the season.

Tourism Volume and Value

3.64 We estimate, using the Cambridge model, that Bridlington earned about £84.9 m in tourism spending in 2002, and that this spending supported in the order of 2,150 full, part-time and seasonal jobs – about 17% of all officially recorded jobs in the town.[22] The total was made up of an estimated 310,000 staying visitors, who spent a total of 1,170,000 visitor nights (almost wholly from the UK taking a holiday) in Bridlington and spent £46.5 million in the town (55% of the tourism spending total), and some 2.1 million day visits (chiefly from Yorkshire & Humberside) generating expenditure generating a further £38.4 million (45% of the tourism spending total).

3.65 Of the estimated 2,150 jobs supported by visitor expenditure, the data suggests that just over a third (746 jobs; 35%) are in the 'core' accommodation and attraction sectors. Even on the Cambridge model, Bridlington has about half as many jobs supported by tourism as does Scarborough.

3.66 Humberside has under-performed the Yorkshire region average in attracting visitors over the past two decades, and in turn, the Yorkshire region has under-performed the England average. Bridlington's performance is unavoidably affected by this, although Scarborough has done better in the same context.

[22] Insofar as the model accounts for jobs that slip through the ONS net (which it does), it is difficult to compare the estimates generated by the model with the statistically based evidence presented elsewhere in the report. Thus the maximum (and this will be an overestimate) share of total employment in the town accounted by tourism will be 17% - and we suspect that it is rather smaller – probably in the order of around 10-12%. We emphasise that Bridlington has, on the comparative data we cited, fewer tourism jobs than other seaside towns – probably both because it does comparatively less tourism business and because the business it does do is lower in value.

3.67 The 2004 East Riding Accommodation Audit[23] estimates that there are 204 accommodation businesses in Bridlington, accounting for just over half the 381 accommodation businesses in the East Riding as a whole. Of these, 126 are hotels or guest houses and nine are caravan parks (with 3,423 vans between them). The town's overnight capacity is in the order of 20,000-22,000; of this, only 10% (2,200 bed spaces) is accounted by hotel bedrooms. Overall, the privately owned static caravans are the most important part of Bridlington's accommodation stock, with 3,423 vans in and around the town able to accommodate 4 to 6 people each.

3.68 The majority of tourism accommodation businesses in Bridlington are small independent operators – and suffer the same disadvantage as SME and micro businesses in other parts of the economy:

- fragmentation
- lack of consistent quality
- lack of specialist skills and difficulty accessing training or advice
- lifestyle business operations
- inability to access economies of scale

3.69 There are exceptions to the generally small businesses, particularly some of the caravan park operators.

3.70 The overall quality of accommodation is modest. Of the 139 serviced establishments in Bridlington, 74 (53%) take part in the AA, RAC or ETC quality assessment schemes. No hotels graded higher than three stars (although there is guest accommodation graded at four or five diamonds). Of the 60% of self-catering cottages and flats that are graded that under the ETC scheme, half are three star or above, two have four stars, and two have five.

3.71 There are 10 caravan/camping parks/holiday villages in Bridlington. Five of them are inspected, all under the ETC scheme, and all five are at 4 star rating.

3.72 All of the serviced accommodation is open between March and October; the highest seasonal closings are in January when about a third are shut and in December when a fifth are. The self-catering accommodation operates a shorter season; all are open between May and September, but around half are shut in January and February.

3.73 The seasonal pattern of occupancy in Bridlington is more pronounced than the rest of East Riding and North Lincolnshire, and in comparison to other areas in Yorkshire. The main reason is Bridlington's comparatively limited business tourism market, but its relative weakness in the out of season short break leisure market (where the cities are particularly strong) is also a factor.

3.74 Occupancy rates for serviced accommodation in Bridlington compared to the rest of the region are shown in Table 3.12 below. The data show that although Bridlington is marginally busier over the four months between June and September than the other parts of the region, it is less so in the other parts of the year, and most particularly during the five months between November and March.

[23] East Riding Accommodation Audit, 2004, CBA Marketing Research Ltd

Table 3.12: Occupancy 2002/3 Rates for Serviced Accommodation – Bridlington Compared to the Region

Bed space Occupancy	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bridlington	17%	17%	23%	38%	49%	60%	76%	83%	67%	47%	25%	18%
East Riding/ N.Lincs*	25%	32%	33%	42%	44%	45%	50%	56%	50%	38%	34%	34%
North Yorkshire*	33%	34%	37%	47%	51%	51%	56%	70%	57%	46%	38%	33%
South Yorkshire*	31%	40%	41%	47%	50%	43%	49%	46%	57%	50%	49%	36%
West Yorkshire*	26%	33%	30%	45%	41%	40%	40%	45%	40%	38%	37%	35%

*Occupancy rates displayed are October 2002 to September 2003
Source: Survey of Bridlington tourism businesses 2004, and Yorkshire Tourism Board Occupancy Survey

3.75 In contrast, the available occupancy information for self-catering accommodation suggests that these types of business in Bridlington are performing above average. Table 3.13 shows the figures.

Table 3.13 Occupancy Rates 2003 for Self-catering Accommodation – Bridlington Compared to the Region

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bridlington self-catering, caravan and camping	33%	34%	25%	48%	60%	78%	98%	99%	80%	42%	27%	16%
East Riding self-catering*	10%	30%	26%	33%	40%	49%	69%	66%	35%	28%	7%	27%
Y&H touring caravan and camping**				35%	46%	46%	51%	72%	33%	36%		

*Occupancy rates displayed are 2003; ** Survey does not operate between November and March. Rates are for 2003
Source: Survey of Bridlington tourism businesses 2004, and Yorkshire Tourism Board Occupancy Survey

3.76 Our discussions with operators suggests that there has continued to be strong demand for the purchase of private static caravans on the sites in Bridlington, and that a number of businesses have converted touring pitches to static sites. The release of funds through the sale/lease of sites has enabled caravan parks to continue investing in facilities. The evolving design of modern static caravans (with heating and double glazing) has allowed a lengthening of the season for this sector.

3.77 RTP conducted a postal survey of Bridlington's accommodation businesses to establish detailed trends in the sector. [24] Of the 46 accommodation businesses we surveyed, 85% in the serviced sector and 93% in the self-catering sector operated under one of the quality assessment schemes (in contrast to the 57% and 60% of businesses respectively in each sector that take part in the QA schemes) – suggesting that those who responded to the survey represent the stronger segments of the sector. Thus the survey results are not wholly representative – but nonetheless shed valuable light on trends in Bridlington's accommodation industry.

3.78 Some 57% of the serviced accommodation businesses and half the self-catering businesses stated that they had taken advice on the management of their business. Two-thirds of the responding serviced accommodation businesses, and 55% of the responding self-catering businesses, reported that their

[24] We carried out the postal survey of accommodation businesses in March 2004. The sample numbers and response rate were as follows: 210 questionnaires were sent out and 46 returned in the time allocated

Type	*Sent*	*Received*	*% response*
Serviced	141	28	20%
Self-catering	60	15	25%
Attractions	9	3	30%
Total	210	46	22%

business volumes had risen over the past five years (only 9% reported declines) – and attributed their success to improvements in management and investment in the quality of their product.

3.79 Four out of five of the responding serviced businesses stated that they had invested in a capital project or major refurbishment in the last five years; the average annual spend reported was about £11,600. All of the self-catering businesses said they had invested in capital projects or major refurbishments over the last five years – and reported an annual average spend of £5,400 (the average excludes two businesses who said they had spent at least £50,000 a year over each of the last five years).[25]

3.80 Four out of five of the serviced accommodation businesses surveyed stated that they procured 80% of their supplies and services locally; the reported proportion for self-catering businesses was 87%. Serviced businesses say they spend 6% of their turnover on marketing, and self-catering businesses report 8%. The sums spent on marketing are probably modest given likely average turnover levels.

3.81 A number of businesses reported that the Spa plays a significant role in providing them with customers; serviced accommodation businesses reported benefiting most. The proportions of overnight visits generated by the Spa varied greatly between businesses – with some stating that as much as 80% of their peak season business depends upon the Spa and others stating that none does. Overall, 12% of the serviced businesses stated that they received at least 20% of their overnights from the Spa during the peak season, and 44% stated they depended on the Spa for 20% of their overnight stays during the off-peak. Table 3.14 below summarises the results.

Table 3.14: Accommodation Businesses: Proportion of Visitors Staying Because of Events at the Spa

Timescale	Serviced Accommodation	Self-catering Accommodation
During peak summer season (June, July, August and September)	10%	3%
During the rest of the year	23%	5%

Source: RTP survey of accommodation businesses in Bridlington, Spring 2004 (see main tourism report)

3.82 The implications of this evidence are important. If the self reporting of the respondents is accurate and representative, the survey findings suggest that about 80 jobs – just over ten per cent – of the town's accommodation jobs are supported by the Spa.[26] Although not numerically huge, the bulk of these jobs are in the more valuable, and typically better trained and better paid, serviced accommodation sector. And, given the Spa's relatively modest output (but greater potential), the dependence of the accommodation sector – particularly the serviced accommodation element during the off-peak season – is significant.

Attractions

3.83 Bridlington has a variety of attractions covering heritage (such as Sewerby Hall, Bayle Museum), general entertainment (such as the North Promenade Fairground, Leisure World) and natural attractions such as Flamborough Head Heritage Coast and the RSPB reserve at Bempton. While the portfolio of attractions covers a broad range of interests, the attractions are more suited to providing a broad range of entertainment whilst visitors are in Bridlington rather than individually forming the main reason for a visit. The exception to this situation is the Bempton RSPB reserve, which as well as forming one of the larger attractions in Bridlington, benefits from being part of a national organisation. The largest single attraction is Sewerby Hall.

[25] We believe the self-reported figures to be on the high side.

[26] Although it is difficult to derive with any confidence arithmetically, it is likely that the serviced sector, which accounts for about 15% of bedspaces, employs 4 times more people per bed space than the self-catering sector. If this is so, then the serviced sector accounts for 60% of all jobs in the accommodation sector – or 465 jobs. If the average dependency on the Spa is about 15%, then the job dependency in the service sector should be similar, equating to about 70 jobs. If the average dependency rate in the self-catering sector is in the serviced sector is about 4%, then the Spa accounts for about 10 jobs. Overall, on this basis we estimate that about 80 jobs in the accommodation sector depend upon the Spa.

3.84 In addition to these attractions other facilities include fishing trips from the harbour, various family leisure facilities such as Montezoomers@the Pavilion etc. and bingo at the promenade.

3.85 There is no clear picture of changing demand for visitor attractions in Bridlington, although the current profile of visitors to the resort has an impact on attractions. There is some evidence of price sensitivity amongst visitors to attractions in Bridlington. Although Park Rose does attract significant visitor numbers, it is primarily operating as a factory shop complementing the working pottery.

3.86 While many of the visitors to the RSPB reserve at Bempton are RSPB members, the reserve attracts a far wider cross section than many other reserves. For example, while between 60% to 70% of the peak season visitors to Bempton are not RSPB members, 80% to 90% of visitors to the Blacktoft reserve near Goole will be RSPB members. Many visitors to Bempton come for the coast and cliffs rather than specifically because of wildlife.

Spa and Leisure World

3.87 The main facilities at the Bridlington Spa are the Royal Hall – used for conferences, exhibitions, events, shows and concerts – and the theatre – used for theatre, musicals, concerts and other events and shows. A total of 105,274 people were estimated to have attended events at the Spa during 2002/3, of which the Royal Hall accounted for two thirds. The conferences at the Spa are mainly association business. The conference facilities need significant investment to secure existing levels of business and to offer the prospect of growth. Further detail is presented in the separate Pan-Leisure report.

3.88 Leisure World contains a set of facilities:

- 25m pool, learner pool and leisure pool with wave machine
- Health and fitness suite
- Sauna and steam room
- Multi-purpose hall
- 3 B's entertainment theatre

3.89 The venue operates as a community sport and recreation facility throughout the year for local residents and during the holiday season it operates as a visitor wet weather attraction. Leisure World attracted 284,832 visits in 2003/2004, of which around 75,000 are Bridlington non-residents. Further detail is presented in the separate Pan-Leisure report.

Activities

3.90 In addition to the variety of informal activities available for visitors to Bridlington (such as walking, cycling etc.), there is a particular set of activities undertaken in the resort: golf; bowls; sub-aqua diving; angling; and boating.

3.91 There are three golf courses in Bridlington:

- Bridlington Golf Club
- Flamborough Head Golf Club
- Bridlington Links Golf Club

3.92 We were told by operators that there is provision for visitors to play golf on a day or 'pay as you play' basis and that there is some over capacity. There have been golf weekend festivals in the past; although there may be some potential to use the facilities to attract visitors, there is substantial competition, particularly around Kingston-upon-Hull.

3.93 An indoor bowls facility runs for six months of the year in Leisure World, generally serving a resident market. Extension of the use is hampered by the size of venue, which does not meet the English Indoor Bowling Association criteria.

3.94 Bridlington attracts sub-aqua divers from a 50-60 mile catchment. While the diving environment is reasonably sheltered, it is silted. At least 10 major dive clubs regularly use Bridlington and there are typically 250 divers on a summer weekend. Typically boats are stored and launched from the South Side compound. While some divers may stay in Bridlington, use of the resort is constrained by a lack of diving back-up facilities, in particular the lack of facilities for re-filling tanks.

3.95 It is understood that there are various wrecks within reach of Bridlington, adding interest to dives directly and through the associated benefits to marine wildlife. There is also a hyperbaric centre in Hull, providing decompression facilities.

3.96 Bridlington hosts the National Open beach angling event, with 1,000 participants of whom around 50% are non-local. We understand that in addition to the competition there is substantial informal beach angling. While there are boat fishing trips from the harbour, these have dwindled as fishing stocks have reduced.

3.97 The Royal Yorkshire Yacht Club in Bridlington hosts an annual regatta as well as national youth and junior sailing events. Bridlington hosts the annual National Board Sailing Championships. The East Riding of Yorkshire operates a boat compound and launching facilities at South Shore.

3.98 Speedboat rides are also available from the Harbour.

Events

3.99 Events play an important role in any tourism market. The larger scale events may have enough profile to draw visitors that might not otherwise consider a trip, and smaller events enable destinations to present themselves with fresh appeal to repeat visitors. Events can also be used to influence the season of visit, which is particularly important in the context of the peaked seasonal spread of visitors in Bridlington.

3.100 Bridlington hosts a considerable number of events, many of which are in the Spa or at Sewerby, and has a particularly strong profile in ‘pub sports’ and hosts nationally significant events. Those we consulted believe that these events have a significant impact on the volume of staying visitors, particularly when they are held outside the main summer season (we have taken this fact into account in estimating the value of the Spa to the accommodation sector – at paragraphs 3.81-3.82 above). Bridlington also hosts important fishing and windsurfing events. Most events, however, are orientated towards the main season.

3.101 The events with the highest profile are considered to be the March Open Beach Championship (international event), the June Windsurfing event (Bridlington is one of the four UK venues), the World Pool event in July, the July and August Regattas, the September Sequence Dancing, the Open Darts in September, and the Darts in October, and the Pool in November.

3.102 In addition to the events in Bridlington are events in other parts of East Riding that are accessible to Bridlington’s visitors, for example the farmers markets and Truckfest Yorkshire (both at Driffield), the antique fairs at Beverly and the classic car rallies at Paull.

3.103 The Spa also hosts a set of shows and conferences in its Royal Hall and Theatre. The key months of usage for the Spa are April/May and October/November, and August/September and December January for the Theatre. While both the Royal Hall and the Theatre host regional and local events, the Royal Hall hosts national events (as noted above).

Natural Environment

3.104 Bridlington's natural assets are the beaches and Flamborough Head Heritage Coast, as well as the rural areas inland (Yorkshire Wolds). Bridlington's North Beach is a sand and shingle beach surrounded by wide promenades backed against the Flamborough cliffs. The South Beach is an extensive sandy beach extending to Spurn Point at the mouth of the River Humber. Both have been awarded Resort Seaside Award flags, which are based upon water quality, cleanliness, safety and beach management standards. The North Beach has been awarded the internationally recognised Blue Flag, which signifies higher standards.

3.105 Both beaches have their own car park access as well as access to the centre of the resort on foot along the promenade or via the seasonal land train service.

3.106 To the north of the beaches lies Flamborough Head Heritage Coast, which has public open space on chalk cliffs, as well as woods and a rocky beach and rock pools. Danes Dyke Nature Trail runs across the headland along a wooded ravine. Flamborough includes the RSPB reserve at Bempton, and the RSPB visitor centre acts as a visitor centre for the whole headland. Facilities include boat trips from North Landing.

Built Environment

3.107 The main elements of the built environment with a tourism role are the Promenade, Harbour area (including the esplanade), town centre and Old Town. The North and South Promenades provide good access to the beaches either side of the harbour for all visitors. The 1999 £5 million refurbishment of the South Promenade was supported by Arts Lottery and won awards from the Civic Trust and RIBA. The promenades provide seating (some of it covered) as well as beach huts, cafes and the land train routes. The promenades and the investment in them are a considerable asset for the resort.

3.108 The working harbour area provides a focus of year-round activity, with 127 drying berths accessible three hours either side of high water, and has a limited range of supporting facilities. The harbour is the departure point for a number of boat and angling trips, and also accommodates the Beside the Seaside Museum, and the Bridlington Harbour Museum.

3.109 The northern part of the harbour area includes the esplanade, which accommodates bars, cafes, the Forum cinema and the adjacent funfair, and leads towards Leisure World. This area provides a concentration of facilities for the summer visitor to Bridlington, although the presentation is mixed and the seasonal nature of business gives a poor out-of-season environment.

3.110 The main town centre area is located just north of the harbour and serves both residents and visitors. Although there are a number of national multiples (we examine the retail sector in detail below) and a variety of eating out venues, the range is limited and the town centre is poorly presented. In comparison to the promenade areas, the town centre appears lacking in investment from both the public and private sectors.

3.111 Bridlington Old Town is located just over one kilometre to the north west of the town centre, and is centred on St Mary's Priory Church and the Priory Gatehouse. The area dates from the 17th century, the Bayle Museum is located there and there are a number of specialist craft and antique shops as well as places to eat.

3.112 Although the location of the Old Town does not encourage beach visitors to make the journey (there is no obvious connection from the promenades/harbour), the area is attracting private sector investment and there are numerous signs of beneficial 'gentrification.' The Old Town provides an attractive small, historic urban environment with year round appeal and clearly is used by at least some visitors.

Human Resource Issues

3.113 Some tourism businesses report having difficulties recruiting staff – which they say is because there are shortages of people with the 'right attitude', the necessary skill sets, and a willingness to work evenings and week-ends. Low pay, though businesses do not like to admit this, is also a factor.

3.114 The basic need is to improve the profitability of tourism businesses so that wage levels can rise which will reduce recruitment and retention problems and permit investment in training which will, in turn, improve service quality and produce the needed pay back in customer satisfaction and ultimately customer demand.

Visitor Security

3.115 There is a relatively small number of drink-related incidents compared to other locations and these assume more of a nuisance value rather than a problem particular to Bridlington.

3.116 The police stance is to aim to make the town safe and 'perceived to be safe' for families to enjoy. There is a town centre CCTV scheme, a positive working relationship with the police, and a Bridlington Safer Communities Forum (binging together the Police, ERYC, and other groups). Bridlington has a higher than average crime detection rate (30%).

Tourism Marketing

3.117 ERYC works with the Hull and East Yorkshire Tourism Association, and Yorkshire's Coast and Country overseas marketing consortium, including Ryedale District Council and Scarborough Borough Council. The Council also works with Yorkshire Tourist Board and is a member of the British Resorts Association, and participates in most of their national advertising campaigns. The Council have also supported Visit Britain's Project George, which promotes England domestically and aims to make people in their 30s and 40s upwards reconsider taking a short break in England rather than abroad.

3.118 The resort is primarily marketed though the Bridlington Guide and the East Yorkshire Short Breaks Brochure. While the Bridlington Guide is well supported by the trade it tends to reinforce the seasonal pattern of visits by repeat visitors. By contrast the East Yorkshire Short Breaks Guide is aimed at building out of season visits.

Future for Bridlington

3.119 Although tourism remains a significant part of Bridlington's economy and is forecast to grow nationally, there are uncertainties about the future of tourism in Bridlington. The main markets served by Bridlington (long holidays) are declining, and the resort has not been successful in attracting significant levels of spending from tourism's growth markets (shorter, additional holidays, activities, cultural tourism, business and exhibition visitors).

3.120 While some seaside towns have been successful in developing market share in these sectors, Bridlington does not have all of the necessary attributes (good choice of quality of accommodation, a choice of good quality restaurants and cafés, diverse and appealing shopping to support the basic appeal of the resort). Equally critical, the current levels of tourism spending and the marginal profitability of many of the businesses do not provide a sufficiently robust platform to encourage the needed risk investment to alter the product sufficiently to diversify the town's market profile

3.121 The recent successes of the urban tourism destinations – e.g., Liverpool, Leeds, Manchester and, increasingly, even Hull – offer something of a model. These all are increasing their appeal on the back of improving their competitiveness in their own catchments (including through job creation attractive to the better skilled) and by developing strong in-town residential markets with a substantial 'lifestyle' element. Visitors of course enjoy the very same qualities – and provide an important source of non-core income which is important to profitability. But the core income comes from their catchments.

3.122 Thus, while Bridlington will remain a centre that appeals predominantly to C1 and C2 markets, there is clearly scope for increasing its AB share. But its ability to do so is predicated on its ability to do better in attracting the custom of these segments of its own residential catchment. Therefore tourism development in Bridlington needs to take place within the context of a regeneration strategy that takes a wider view of Bridlington's economy and focuses on the interventions needed to address the fundamental issues of town's labour market imbalance and low average incomes.

3.123 In Section 4 which follows, we continue our performance analysis of Bridlington and consider the retail, housing and business space markets, transport and access and a number of other quality of life issues. In Section 5, we consider prospective demand in Bridlington's key town centre and tourism markets, and for the services supplied by the Spa and Leisure World. Finally in Section 6, we pull together the various strands of the performance to reach our overall conclusions on the factors that explain Bridlington's performance and need to be addressed by the Regeneration Strategy.

4 PERFORMANCE ANALYSIS: RETAIL & LEISURE, HOUSING, BUSINESS SPACE, FISHING INDUSTRY, TRANSPORT AND ACCESS

Introduction

4.1 We continue our performance analysis in this section, and consider the retail and related leisure sector, the housing sector and the prospects for the town centre, the business space market, the local fishing industry (which is based in the harbour) and, finally, transport and access. In Section 5, we examine prospective demand in Bridlington's principal sectors, and in Section 6 draw together the different strands of the performance and draw our conclusions on the factors that explain the town's performance and need to be addressed by the Regeneration Strategy.

Town Centre Retailing

4.2 A detailed study into the retail sector in Bridlington was carried out in 2006 and forms part of the evidence base for the Town Centre AAP. We do not repeat the findings of that work here, but have drawn upon the conclusions in detemining the future demand for retail premises set out in Chapter 5.

The Housing Market

4.3 Although the town centre housing market is limited, the anecdotal evidence suggests that when properties do become available they are quickly sold. Overall, the town's housing market is relative strong.

4.4 In the last three years, completions in the town have averaged just under 200 a year – and this rate is probably a reasonable indicator of future trends. In the last two years, more than half of completions have been on brownfield land. Changes of use (e.g., from a guest house to residential or a house to flats) account for a small proportion of total completions (just under 10% on average, although the share appears to be rising).

4.5 Most completions are houses or bungalows, although the popularity of flats is growing. In both 2002-03 and 2003-04, about a third of completions were flats. Most completions are new builds.

4.6 We contacted three volume house builders active in Bridlington's market and asked them their views of the market. This is what we found:

- Housebuilder A:
  - house Types are between 2-4 beds with a mix of semi, and detached; all have a small plot of land;
  - all their recent housing developments have been to the north of Bridlington towards Flamborough;
  - prices: £180,000 for a 4 bed detached; £125,000 - £146,000 for a 3 bed detached;
  - prices are similar throughout new developments in Bridlington (reasonably expensive compared to surrounding areas);
  - some customers are local, most are from surrounding towns or West Yorks.
  - generally retiring couples; 1-2% are families or young professionals.
  - demand is very high, all types of houses selling well as they are all aimed at older/retiring residents;
  - land in the northern part of Bridlington is not in short supply and builder A is considering further developments;
  - no real constraints to delivering the development.
  - edge of town is the preferred location.

- would not be interested in sea front apartments, unless there is evidence that the demand for that type would be sufficient;
- mainly owner occupiers, possibly 1% investment buyers.

- Housebuilder B:
  - house types are 2 and 3 beds terrace, semi and detached. Development is called Burlington Heights and is towards the north of the town on the outskirts.
  - prices: £124,995 for a 2 bed mid terrace, £138,995 for a 2 bed semi, £162,995 for a 3 bed semi; prices are comparable to other developments in Brid; not as expensive as Scarborough or Whitby;
  - most buyers are from West Yorks looking for retirement houses;
  - demand is high and all types of houses are selling well;
  - further developments will be considered;
  - no problems in delivering developments; planning not a significant issue;
  - edge of town and outskirts are the preferred locations, towards the north of Brid;
  - would have to research the possibility of sea front apartments to assess demand;
  - purchasers are generally owner occupiers (rather than investors).

- Housebuilder C:
  - house types for current developments are Bungalows, 2, 3, & 4 bed houses, semi and detached, on northern outskirts of Brid.
  - prices: 2 beds from £109,995 and 4 beds from £189,995;
  - most buyers from elsewhere mainly for retirement homes; very few locally;
  - demand is high, houses are selling well, new phase to be released soon;
  - no problems in delivering development;
  - current developments are in the best location, would be wary of sea front developments as most demand is for detached houses/bungalows with gardens etc to suit older residents.

4.7 In most locations with new or developing town centre housing markets, the early development activity has been done by local builders. The volume sector tends to be more risk averse, partly because they lack the knowledge of the market of the local sector; but once markets have been demonstrated, the volume builders tend to move in.

4.8 We believe that Bridlington town centre, with the right micro-setting and development quality, sea views and so on, is capable of developing a strong (if small) 'lifestyle' housing market – targeted at the young as well as the empty nester segments of the market. Housing development of this ilk has been an important part of the development mix in the more successful seaside towns, just as it has proved an important element in the revival of urban town centres.

4.9 But, as we explain in Section 7, the possibility of creating such a market for Bridlington rests on a number of other factors – all under the umbrella of a commitment by the Partners, backed up by action, to making *substantial* improvements in the appeal of the town centre and its offer in both shopping and leisure provision.

The Business Space Market

4.10 Drivers Jonas examined the current levels, types and standards of business space in Bridlington and assessed prospective future demand. Drivers Jonas also conducted a face-to-face survey of 50 businesses in Bridlington; although the results cannot be said to be general to all businesses in

Bridlington[27] and must therefore be treated with considerable caution, they provide some useful insights into those interviewed.

4.11 In the discussion which follows we provide an overview of the findings, most particularly in respect of the factors which characterise the performance of the local business space market and explain its performance. We deal with prospective future demand in Section 5.

4.12 Drivers Jonas found:

- As in business space markets everywhere, location is central to market performance. Bridlington is remote from market concentrations and has, as do all seaside towns, half a catchment; it is some 45 miles, on a single land carriageway, from the M62 (about an hour's drive); and is not on a route to anywhere else.

- Most businesses are locally owned, because the entrepreneurs live locally. There are exceptions – e.g., Britax and Hibernia – but these, DJ, report, located in Bridlington induced by grant aid which is no longer available. Nonetheless, it is also clear that businesses are able to serve wider markets from Bridlington (18 of the firms interviewed, in a range of sectors and carrying out an equally diverse range of functions) serve national and international markets from their Bridlington base. But the origin of the entrepreneurs is local, and given the competition for such activity, will continue to be (but can include people returning to their roots).

- There is a *very* substantial supply of land in Yorkshire that is in competition with Bridlington, and property values are low across the region (so Bridlington cannot compete on price advantage). Because property values are low, the supply of premises is also limited and there is (according to a DTZ Peida report) a 'shortage' at all sizes (but not at prices the market is prepared to supply).

- Town centre offices in Bridlington vary from less than £2 sq ft, to over £9 sq ft for 'two rooms.' Supply is mostly above shops, for which there is low demand and there are vacancies. Insufficient car parking and traffic congestion in the season particularly are a major deterrent (as is the quality of the supply).

- Edge of town offices let at rents, inclusive of services, of £9-11 sq ft. Bessingby Business Centre is the 'prime' location for small suites.

- Industrial and warehouse property lets at £3-5 sq ft.

- Yield evidence is extremely limited; one of the Bessingby properties traded at 10.59% reflecting the level of risk. The investment property market, however, is less concerned about location and the property product if the occupier and lease terms are good and there is the prospect of growth. Bridlington could operate in the investment market if these essential ingredients are in place. At present, however, values are too low to produce an adequate capital value and profit to attract private risk investment.

- Banks in Bridlington are willing to finance property provided a business case is made. The suggestion, because so little property attracts this investment, is that the market (chiefly the owner occupier market) is not fully aware of the opportunity.

4.13 In respect of Bridlington's industrial estates, Drivers Jonas found:

[27] RTP provided Drivers Jonas with a sampling frame, and it would be possible to analyse the results in this way. To do so would require respondent firms to be grouped according to sector and type (e.g., small or large; production or sales etc), judgments to be made about their representativeness of their sector and their responses analysed accordingly.

- **Carnaby Industrial Estate** (owned, save for parcels that have been sold on to owner occupiers/developers, by the ERYC): 25.3 has of prepared land, of which 16.3 has is available for development, plus a further 49.6 has of land reserved for future development. Because of the shape of the estate, the available land has no frontage which impinges adversely on its appeal. Broadband is not available. The reserved land is not serviced, and is unlikely to be developable without public provision of the infrastructure needed. A 2.9 ha frontage site owned by Yorkshire Forward is being marketed; DJ conclude that speculative development is unlikely, and in the absence of a bespoke scheme, suggest that breaking the site up and servicing it could speed its development. Less than half the building stock at Carnaby is judged by DJ to be in good condition, and 11% is in poor conditions; building quality in DJ's view is beginning to be problematic.

- **Bessingby Industrial Estate** (owned, save for parcels that have been sold on to owner occupiers/developers, by the ERYC): located about a mile from the town centre. Comprises two elements – the older industrial premises and a newer business centre for young businesses, often start-ups. The traditional buildings are mostly in manufacturing use. The larger and older buildings at the rear of the estate are vacant and have proved difficult to let or dispose of. The estate is largely developed. A 0.29 has plot next to the Business Centre remains, plus a 2.59 has plot at the rear; the latter is on the market and two local companies (one in manufacturing and one in distribution) are reported to be showing an interest. DJ judge that just over a fifth of the stock is in good condition, and just under a fifth in poor condition; the rest is average.

- **Bessingby Business Centre** (owned by the ERYC): a 555 sqm small unit scheme built by the Council to meet the needs of new small businesses; unit sizes are very small (7-52 sqm). There are common reception, kitchen and meeting room facilities. All units are in office use, although some storage takes place. Lets are on monthly licenses; there is a waiting list for new firms, but because the existing tenants cannot move on (for lack of space). As is common for such schemes, the types of occupier is diverse.

- **Pinfold Lane Industrial Estate:** the smallest of the three estates, located about 1.5 miles north west of the town centre. Access is through a residential and there is some conflict. Voids are low and concentrated in the older and poorer properties. Most buildings are in moderate condition, but building quality and specification is becoming problematic.

4.14 In respect of demand, the studies reviewed by DJ (all commissioned by Yorkshire Forward or the Council) suggest that there are shortages of space and that speculative development in the 3,000-5,000 sq ft bracket should succeed. Most of the enquiries received by the ERYC are for units in the 1,000-3,000 sq ft band, followed by the 5,000-10,000 sq ft demand. DJ take the view that because there is little to offer enquirers, there is prospect demand that is frustrated by the lack of appropriate supply.

4.15 DJ's found the local agents all feel that demand for small units is reasonably buoyant; that when supply is available it is readily let. Agents also say that prospective office occupiers (not surprisingly) do not want first floor offices above shops, but will look at taking secondary shops and seeking an A2 consent.

Bridlington's Fishing Industry

4.16 One of the principal users of Bridlington's harbour is the local fishing fleet; some 45 licensed fishing vessels operate from the harbour with a combined (reported) workforce of around 100.[28] All of the activity is in the shellfish sector (because of constraints on white fish).

[28] The information on Bridlington's fishing industry is taken from DEFRA statistics and work carried out by the ERYC, including consultations with the local fishermen. The key documents drawn on by the Council are reports by the North Eastern Sea Fisheries Committee, which produces annual reports on the fishing effort along Bridlington's coast, the Shellfish Permits Landing Statistics and Scientific & Research Strategy for 2004-2009.

4.17 The North East coast contains some of the most important shellfish waters in the UK; Bridlington has landings of around 3,000 tonnes, with an estimated landing value of around £4.5m per annum. The targeted shellfish are lobsters, edible crabs, velvet crabs and whelks. There are, from Bridlington, over 23,500 crab and lobster pots and 1,000 whelk pots, totalling a reported 6.9million pot days a year.

4.18 All of the catch is processed elsewhere – within the UK and in France/Sapin especially. We understand that Bridlington's fishermen have long-standing relationship with their buyers, and although they consider that there is potential for value-added activity locally (processing, retail sales), the fishermen would be reluctant to sell to new or different parties and want to get a guaranteed price at the quayside.

4.19 The Council is considering the potential for unlocking this Catch 22. Their initial view is that the start-up costs and risks of a new processing plant would be high and viability could require the fishermen, even if they joined forces and formed a cooperative of some sort, to sell at lower rates than they do at present. Whether one of their buyers might invest in plant in Bridlington is not known, although we understand the Council is exploring the potential.

4.20 There are no retail outlets in the town for the locally caught fish – and again the Council is exploring the potential. There is also no effort to market the product or to brand Bridlington's pre-eminence in the sector. The fishermen take the view, and the Council agree, that there should be tourism interest in the industry for example watching the catch being landed.

4.21 Whilst the lobster fishery is considered to be fished sustainably[29], there are gaps in the fishery management and knowledge of the ecology/biology of the stocks which have prevented MSC[30] status being achieved. Work is underway to address these gaps and therefore achieve MSC status.

4.22 Meanwhile, however, the fishermen are operating from sub-standard facilities that reduce their efficiency and add to their costs. There is poor access to the south pier (large lorries reverse down the chicken run jetty, there is little storage space at the landing area, insufficient covered space, no chilled storage facilities, limited holding tanks and difficulties with boat repair facilities. As a short stop measure, pending a decision on promoting a marina proposal, the Harbour Commissioners are in the process of agreeing a programme of modest improvements with the fishermen.

Access

4.23 WSP Transport is in the process of preparing a comprehensive assessment of traffic and access issues in Bridlington. All of the following are issues which the transport evidence shows to constrain the efficient and competitive performance of the town:

- the 'seasonal surge' which causes traffic congestion both on the approaches to the town and within parts of the town centre;
- the mix of through and local traffic in the town centre;
- the siting and signing of car parking which encourages circulation around and through the centre rather than parking on the fringes, with opportunities to egress without crossing the centre;
- insufficient parking in the town centre which is provided almost entirely in a series of surface car parks;

[29] Certification Report for NESFC Lobster Fishery, North East Sea Fisheries Committee 2005

[30] Marine Stewardship Council Principles and Criteria for Sustainable Fishing

- car-pedestrian conflict in the town centre due to the relatively limited extent of pedestrianisation in the core;
- poor / congested access into and out of the town centre from the surrounding areas, deterring people from using the town centre and encouraging travel to, for example, Driffield and Scarborough instead; and
- congestion and delays on the A614 between Driffield and Bridlington, discouraging trips into Bridlington, which should be the centre the Driffield catchment uses for its main comparison shopping.

4.24 WSP's work corroborates the anecdotal evidence, including the reluctance reported by businesses to consider a town centre location and the concern expressed by local people, most particularly over the impact of the holiday trade, especially during the peak summer months.

Other Quality of Life Issues

4.25 We reviewed in Section 1 the views of Bridlington's residents on local quality of life (all positive, save for comments on the town centre), and supplement these with local crime statistics. Table 4.3 below summarises reported crime in Bridlington between 2000-01 and in 2003-04.

Table 4.3: Crime in Bridlington 2001/2 – 2003/4

	2000-01	Per 1000 people	2001-02	Per 1000 people	2002-03	Per 1000 people	2003-04	Per 1000 people
Violence against a Person	457	12.3	603	16.2	840	22.5	1,162	31.2
Vehicle Crime	400	10.7	472	12.7	339	9.1	372	10.0
Burglary Dwelling	307	8.2	357	9.6	326	8.7	202	5.4
Burglary Other	344	9.2	431	11.6	391	10.5	281	7.5
Robbery	33	0.9	39	1.0	62	1.7	46	1.2
Sexual Offence	28	0.8	43	1.2	30	0.8	39	1.0
Theft & Handling	1,171	31.4	1,097	29.4	1,119	30.0	1,042	28.0
Fraud & Forgery	117	3.1	135	3.6	110	3.0	103	2.8
Criminal Damage	746	20.0	786	21.1	754	20.2	937	25.1
Drug Offences	107	2.9	167	4.5	126	3.4	162	4.3
Other Offences	41	1.1	40	1.1	67	1.8	38	1.0
Totals	**3,751**	**100.7**	**4,170**	**111.9**	**4,164**	**111.7**	**4,384**	**117.6**

Source: Bridlington LPT

4.26 The data show that crime has increased in a number of categories – but we only have comparative data for a selection of the categories, making it difficult to know whether trends in Bridlington are similar to, worse or better than elsewhere in the sub-region. Violence against a person, already the third highest source of crime in 2000-01, rose by 154% and was the highest source by 2003-04. Drug offences roses by 51%, but still account for a very small share of all crime. Criminal damage rose by 26%, and by 2003-04 was the fourth largest source of crime in Bridlington. Robbery and sexual offences increased by 39% each, although the incidence of both is still small.

4.27 Burglaries of dwellings fell by 34% and other burglary by 18%. There were also small falls in vehicle crime, theft and handling and fraud and forgery. By 2003-04, violence against a person, theft and handling and criminal damage together accounted for 70% of all crime in the town.

4.28 We know that in the East Riding as a whole during 2003/2004 there were 17.4 reported crimes per 1,000 population of violence against a person; 11.5 instances of vehicle crime per 1,000 population;

10.5 burglaries at a dwelling and 16.27 instances of criminal damage (also per 1,000 population). Thus in Bridlington there were much higher rates than the average of violence against a person and criminal damage, but lower rates of vehicle crime and burglary.

4.29 In Section 5 which follows, we examine prospective demand in the markets in which investment is required if Bridlington is to achieve its ambitions for regeneration.

5 DEMAND IN BRIDLINGTON

Introduction

5.1 We set out in this section our assessments of prospective demand in the sectors that are the most important for Bridlington's regeneration: overall employment demand; retailing (now provided in the 2006 retail study) and associated leisure, tourism spending; central area housing; demand for the Spa; demand for business space; and demand for marina berths.

5.2 In Section 6, we pull together the various strands of our analysis to set out our conclusions on the factors which best explain Bridlington's performance: the market failures that have frustrated demand; the other factors that have impinged on performance; the assets that offer further scope for improving competitiveness; and the other opportunities there are to enhance well-being and local quality of life. We conclude with our vision for Bridlington, the objectives we propose for achieving it and the candidate projects for satisfying the objectives. Finally, in Section 7, we outline the Regeneration Strategy and present our advice for delivering it.

Forecast Population Change

5.3 In the absence of any official population forecasts, we have estimated future growth in Bridlington using the 2004 based sub-national population forecasts for the East Riding of Yorkshire issued by the Office for National Statistics. The 2001 Census gives Bridlington's population as 37,270. The estimates suggest growth of 3% between 2001 and 2006, 5% between 2006 and 2011, and 6% between 2011 and 2016 – or just over 14% over the 2001-2016 period.

5.4 These rates of growth suggest that Bridlington will gain, between 2006 and 2016 a further 4,300 (in round numbers) people. If the current proportion of working age obtains in 2016, the effect would be to increase the numbers of working age residents in Bridlington by 2,400 (in round numbers). We set out the implications for the labour market balance below.

Forecast Employment Change

5.5 We begin the demand work by setting out our overview of prospective employment change. The overview is important because it is our best effort to calculate likely net employment change over our forecasting period – to 2016 – which is about a far ahead as it reasonable to quantify change for. The employment forecasts subsume the forecasts we prepared for the tourism sector.

5.6 To establish Bridlington's capacity to create the new jobs it needs, forecasts of prospective employment change have been prepared for two scenarios:

i) a base case (reflecting longer term growth trends); and

ii) a higher growth case (which reflects the stronger economic growth rates experienced in the region over the past 4-5 years).

5.7 These are derived from forecasts prepared for the RSS and RES by Yorkshire Futures using a regional econometric model, and have had regard for the Council's Employment Land Study.[31]

[31] This study was prepared for the Council in 2007 and is available on the Council's website. The study does not deal specifically with office demand in Bridlington. That work was done for the Bridlington Regeneration Strategy, which has been updated to provide part of the evidence base for the Town Centre AAP.

5.8 These scenarios assume that there will be no constraints to achieving the forecast growth imposed by the lack of appropriate development sites and property or infrastructure or operating conditions (the only constraints assumed in the forecasting model relate to the size and character of the labour market). This is a critical assumption as the forecasts are only a measure of the economy's capacity – what could happen if there were no constraints in terms of land, property and infrastructure.

5.9 The base case employment forecast also assumes no significant additional public sector investment (no more than has been the case in the past in Bridlington). The scenarios are calculated by assuming that Bridlington's relationship to the performance of the East Riding as a whole continues into the future (i.e., the ratio of employment growth, sector by sector, in Bridlington32 to the East Riding between 2002-2016 reflects the existing position).

5.10 The high growth forecast assumes a significant level of public investment – but excludes the job creation potential associated with the proposed town centre redevelopment. As we explain in Sections 6 and 7, the policy on scenario could be exceeded if there is sufficient development in the town centre to reclaim expenditure currently lost to other centres, accommodate the expenditure growth of the existing catchment and capture the spending of the new population. But as we explain in those sections, exceeding even the 'policy on' scenario will require a considerably more competitive consumer service offer.

Table 5.1: Forecast Employee Employment Change in Bridlington: High and Base Case Assumptions 2002-2016

		Base Scenario			Hi Growth Scenario		
			Change 2002-2016			Change 2002-2016	
	2002	2016	No	%	2016	No	%
B2 (Manufacturing)	3,223	3,107	-116	-3.6%	3,261	38	1.2%
B8 (Wholesale & Warehousing)	1,489	1,600	111	7.5%	1,661	172	11.6%
B1 (Offices)	1,712	2,074	363	21.2%	2,152	440	25.7%
Other sectors	12,204	14,078	1,874	15.4%	14,428	2,225	18.2%
All Employment	18,628	20,859	2,231	12.0%	21,502	2,875	15.4%

Source: RTP and BSL Experian (Yorkshire Futures)

5.11 The forecasts exclude prospective growth in self-employment – which is likely to grow broadly in proportion to the sectoral change forecast..

5.12 The results of the forecasts show:

- **under the base case scenario,** overall employment is forecast to grow in Bridlington by 12%, adding 2,230 net additional jobs over the 2002 total – in line with what is needed, on the assumptions the evidence suggests, to bring the local labour market into balance;
- **under the high growth scenario,** employment is forecast to increase, net, by over 15% over the period between 2002 and 2016 – producing a net gain of about 2,875 jobs. This level would enable participation and unemployment rates to come into line with the sub-regional averages.

Policy-Off Base Case

5.13 Under the base case, 'policy-off', scenario, we forecast that overall employment will grow in Bridlington by just 12%, adding, net, 2,230 jobs, over the current 2002 total. Under the base case scenario, manufacturing continues to lose jobs, but at a reduced rate compared to previous years, and warehousing employment increases by some 8% (we discuss the implications for industrial floorspace below). The key office based services gain employment, adding, 360 employee jobs while other sectors contribute just below a further 1,900 jobs.

[32] Here, the area approximating to 'Bridlington' has been defined using data for the wards of Bridlington North, Bridlington South, Central & Old Town and East Wolds & Coastal (to ensure that employment located at Carnaby is taken into account).

5.14 Clearly, the implication is that under the base case, unemployment will decrease once account is taken of the forecast increase in numbers of working age and economically active, but will still be considerably higher than the sub-regional average. .

5.15 The 'policy off' scenario cannot be seen as acceptable; current unemployment levels are unacceptably high, even with very low economic activity rates. We set out the implications for Bridlington's labour market balance below.

5.16 On this basis alone, the case is made out for intervening in Bridlington's economy to remove the factors which have depressed performance relative to the region and to take advantage of the town's distinctive assets and other opportunities.

Policy-on High Growth Scenario

5.17 Under the policy-on, high growth scenario, we forecast a net increase in employee jobs of almost 15% over the period between 2002 and 2016 – a net gain of about 2,875 employee jobs. The net increase allows Bridlington to keep pace with the growth in employment demand generated by the forecast population growth, assuming that the population and labour market forecasts are correct and the same proportions seek work in Bridlington as now (see paragraph 5.17 below).

5.18 Overall under the high growth scenario,manufacturing employment actually increases very slightly and employment in the distribution sectors increase by almost 12%. The import office based sector employment increases by over a quarter and the other sectors grow by 18%.

Labour Market Balance

5.19 The implications of the demand forecasts for labour market balance[33] in Bridlington are – assuming that the working age population increases as forecast (to 23,185 in 2016) – under the different assumptions for economic activity and unemployment rates shown:

- If economic activity rates remain at 70% and unemployment at 6.4%, Bridlington will need an additional 1,575 jobs in round numbers by 2016. The base case forecast produces 2,230 jobs – suggesting that unemployment will decrease to around 2.5% in 2016. The policy on, high growth forecast produces 2,875 jobs, suggesting (as noted above) that unemployment will fall even further.
- If economic activity rates are to rise to a healthier 75% and unemployment is to fall to 3%, Bridlington will need to create an additional 2,890 jobs by 2016. The high growth scenario almost achieves this target.

5.20 Clearly, closing the jobs gap and reducing unemployment to more acceptable levels will take considerable effort and investment – but this has happened in other seaside towns. Table 3.8 shows, for example, that St Ives and Weston super Mare both achieved over the shorter 11 year period between 1991 and 2002, achieved employment growth of 23% and 22% respectively and Whitstable did better yet (65% over the period), although the circumstances in the latter two instances (but not St Ives) were more auspicious.

5.21 As we suggest below, Bridlington could, with the town centre redevelopment proposed (adding 37,600 sqm of retail and ancillary leisure floorspace to the other policy on scenario assumptions), create a further net 1,930 jobs by 2016, making a significant contribution to the achievement of the forecast gain under the policy on scenario.

[33] Labour market balance means that Bridlington has enough jobs for its economically active population. A jobs gap is the gap between the number of jobs in Bridlington, including self-employed jobs, and the number of economically active residents after accounting for out-commuting (which we do not allow for here – but use instead the Census-based data in Table 3.3 as accurate commuting data are not yet available).

Floorspace Implications: Office, Manufacturing and Warehouse Space

5.22 It is possible – and RTP sets the industry standard in doing so – to approximate the office and industrial floorspace implications of the forecast change in employment. As stated earlier (see Footnote 15), we use employment in certain employment sectors to approximate office-based jobs, employment in manufacturing to approximate the need for industrial floorspace and employment in warehousing activities to approximate the need for distribution space.

5.23 Ordinarily we use two methods: one based on the econometric forecasts and the other on trend based activity in a local property market. The forecast-based approach has the advantage of allowing us to look far ahead, but it is subject to the same uncertainties that all forecasts are; the other has the advantage of being based on the real property market, but is constrained on how far ahead it is possible to look.

5.24 Because of the limited transactions in Bridlington's market, we are handicapped for data to use the latter method, and rely on Drivers Jonas own assessments of what they feel the market will bear. As Drivers Jonas point out, the main task in the business space market is not to accommodate expansion, but to generate the investment needed to replace outworn industrial and warehousing stock so that firms can operate from premises that enable, rather than frustrate, efficiency. The exception is the need to unlock the bottleneck caused, on the one hand, by the lack of grow-on space to enable businesses at Bessingby to move out and expand, and the need for additional capacity for very small firms to feed this demand from the bottom.

Industrial and Warehouse Space

5.25 Overall, nationally as well as regionally, the requirement for industrial and warehouse floorspace is shrinking; this is not to say that replace space is not needed, or better space, but that the stock requirement is falling as employment in these sectors shrink. Bridlington is no exception.

5.26 The forecasts suggest that the net stock requirement for production space will fall over the forecasting period by 3,600 sqm (approximately 38,700 sq ft) under the base case, policy off scenario and increase by 1,200 sqm (approximately 12,700 sq ft) under the high growth, policy on scenario. Under the base case, policy off scenario the need for warehousing stock will increase by 3,400 sqm (approximately 37,000 sq ft) and by 5,300 sqm (approximately 57,000 sq ft) under the high growth, policy on scenario.

Offices

5.27 Although Bridlington has no office market as such, there is still a requirement for offices – as the success of the Bessingby Business Centre testifies. Moreover, the lack of product (and conducive operating conditions – especially in the town centre) would appear to be one of the key factors in why Bridlington has performed so much worse than other seaside towns, and very much worse than the rest of the East Riding, in office-based activity.

5.28 The employment forecasts suggest, under the low growth, policy off scenario (which we would equate with the modest effort to support the grow-on space provision), a requirement for a net gain in office stock over the period of 6,500 sqm (approximately 70,000 sq ft).

5.29 Under the high growth, policy on scenario, the forecasts suggests a requirement for a net gain in stock of 8,000 sqm (approximately 85,200 sq ft) to 2016.

5.30 In practice, the new build / refurbishment requirement will be greater than the net stock change figures suggest – not just to allow for churn (choice in the market, which requires a certain level of vacancy) but to allow for replacement / substitution of sub-optimal space.

5.31 There is no point in Bridlington in hoping that the empty upper floors of shop units will meet office space needs. The market does not want this space, and failing to unlock the Catch 2 in provision of decent small office units in the hope of bringing this space into use only fetters the growth potential of office-based activity.

Tourism – Forecast Growth in Spending and Tourism-related Jobs

5.32 The employment forecasts set out above already include our estimates of forecast employment change in tourism activity. The discussion here deals solely with tourism, but as a sub-set of the wider economy.

National Forecasts of Tourism

5.33 Most national tourism agencies do not attempt separately to forecast tourism activity as far ahead as econometricians are confident of doing for the economy as a whole. A recent study of tourism in the South West commissioned by the South West RDA, however, included some long term forecasts of changes in the main markets at national and south west level. The forecasts assumed:

- continued increases in national GDP and personal incomes at around 2% a year, in line with government expectations;
- a stable relationship between the propensities for holiday spending to rise with personal incomes, based on the trends during the 1990s;
- continued growth in holiday spending abroad linked to the growth in incomes modified by changes in the exchange rate, and assuming that exchange rates would remain at the 2001 level.
- forecast population growth.

5.34 The forecasts suggest that UK tourism in England will continue to grow, with the fastest growth taking place in visits to friends and relatives, short breaks and business sectors. The growth in nights and spending is forecast to grow more slowly than the rate for trips. Long holiday trips are forecast to remain stable at around their current level, but nights are forecast to decline slightly.

5.35 Applying the national forecasts to Bridlington would suggest, optimistically, a growth in trips to the town of 50% over the next fifteen years, with nights increasing by 20% and spending in real terms by 24%. Should this be achieved, then some modest growth in tourism employment of around 10% might be anticipated, assuming that labour efficiency in the tourism sector increases by around 1% a year. On the spending based assumptions of employment, this implies a net increase of only some 215 tourism jobs over the period (if productivity improvements are discounted, job growth in the sector would be some 450 jobs).

Forecasting Assumptions for Bridlington

5.36 However, it seems unlikely that growth on the scale inferred in the national forecasts could in fact take place in Bridlington for a number of reasons. These include:

- Bridlington has performed counter to the national trend. The long term decline in the market share of the seaside as a destination for short and long holidays nationally has occurred against a backcloth of tourism growth nationally. During the 1990s alone, the seaside share of the national short break trip market declined by 6% and the long holiday trip share by 2%. The share of long holiday nights fell by 5%.
- The relative loss of holiday market share by Yorkshire against England as a whole. Over the last decade, Yorkshire's short holiday share fell by 16% and long holiday share by 9%

- The relative underperformance of Humberside and by inference Bridlington, against Yorkshire regional trends over the last twenty years. Humberside's share of tourism trips within Yorkshire fell from an average of 19% at the beginning of the 1980s to 14% at the beginning of this century, with the great bulk of the fall being due to a fall in holiday activity. However, much of the change appears to have taken place in the 1980s, with little difference in Humberside's performance compared with Yorkshire as a whole in the last ten years.
- Slower population growth in the main origin areas for tourism in Bridlington. Population growth in Yorkshire, the North West and East Midlands is likely to be lower than for the South East, Eastern and South West. Thus while the sub-regional 1996-based population forecasts prepared by the government actuary indicate a 5.6% increase in population for England as a whole to 2016, the population of the Yorkshire region only increases by 2.6%. The slower rate of population growth is likely to be reflected in the continuing underperformance in holiday tourism in the region.
- The long term changes in the socio-economic mix, with AB groups growing and DE groups declining in proportional terms. This trend is likely to affect seaside destinations adversely.

5.37 Taking account of these factors, it is reasonable to assume that Bridlington is unlikely to be able to achieve the growth rates implicit in the national forecasts. Therefore, we have adopted the following assumptions in our forecasts:

- Yorkshire's share of the short break and long holiday market will continue to decline albeit at a slower rate than the last ten years. It is assumed that over the next fifteen years, the market share loss will be at two-thirds of the annual rate experienced over the last decade. Yorkshire will maintain its share of business, visits to friends and relatives and other tourism trips.
- The seaside share of the long holiday market will continue to decline slowly affecting Bridlington's share of the Yorkshire market. The rate of decline is assumed to be equivalent to two-thirds of the average annual rate for the last decade.
- The seaside share of the short break market will also continue to decline slowly again affecting Bridlington's share of the Yorkshire market. The rate of decline is assumed to be equivalent to two-thirds of the average annual rate for the last decade.
- Business and visits to friends and relatives tourism in Bridlington are assumed to grow at the national rate
- Overseas visitors will increase in line with national forecasts
- Day visitors will increase by 2.5% by 2016, in line with forecast population growth in the catchment area, with spending per trip remaining constant in real terms.

The Policy-off Tourism Forecasts

5.38 On this basis, it is forecast that Bridlington could experience a 29% growth in staying tourist trips, but only a 4% increase in staying nights and a 5% increase in expenditure at 2002 values. Tourism day trips would increase by 2.5% with an equivalent increase in real spending. The main changes would include a sharp fall in long holiday activity and a steep increase in visits to friends and relatives trips. Given the limited growth in expenditure, coupled with an anticipated increase in labour efficiency, this forecast would suggest a *decrease* in tourism related employment of around 5%-10%. If productivity does not improve, the consequence would be little change in tourism employment compared to 2002.

5.39 The average annual rate of change is less than 2% increase per year for staying trips and less than 1% per year for nights and expenditure.

A Possible Policy-on Tourism Scenario

5.40 If we assume instead that all of the following projects are implemented, it is possible to create a 'policy on' scenario which we believe could produce an entirely different outcome:

- Marina – providing economic benefits from the expenditure by boat owners as well as creating new development land (thereby facilitating some of the other regeneration projects) and re-positioning Bridlington's image as a destination for growth markets.
- Spa – undertaking the capital work necessary to allow this important asset to retain its existing share of the (marginally growing) conference, exhibition and event business.
- Serviced accommodation increases in response to the other improvements proposed by the Regeneration Strategy.
- The opportunities to increase the number of activities (e.g., water sports) is taken.
- More events are hosted, most particularly taking advantage of the Marina and improved Spa.
- Improvements to the built environment are made, increasing the appeal of the town.
- The proposed improvements to the town centre, including in particular the provision of more and better shopping facilities and food and drink opportunities.

5.41 While we hesitate to guess what the net effect on employment purely on tourism jobs of all of this would be – we consider it not unreasonable to envisage a 15% uplift by 2016 on our current estimate of tourism employment, or a net gain of about 325 tourism jobs. We stress that these jobs are already accounted by the 'policy on plus town centre redevelopment' presented above.

Housing in the Town Centre

5.42 At the time of preparing the Regeneration Strategy we had no firm basis for estimating with any confidence what the demand might be for flats in the town centre. However, at that time over the previous two years, flats hade accounted for about a third of completions. A conservative estimate would suggest annual demand in the order of 50-60 flats a year – or 600-700 over the 12 year (2004-2016) forecasting period. A more bullish estimate, in line with the last two years, suggests an annual completion rate (in a policy supportive environment) of closer to 70 flats a year, or about 850 units over the forecasting period.

5.43 If there were a good quality town centre regeneration scheme (improving the retail and leisure offer), coupled with a marina, the 70 flats per year average – in a supportive planning policy environment – would be a reasonable and realistic target.

5.44 More recent evidence on housing requirements is provided in the East Riding Housing Market Assessment , Housing Land position statement and Managed Release Interim Planning Guidance Monitoring Scheme.

Business Space

5.45 Drivers Jonas judge that there could be demand over the next 10-12 years for about 20,000- 40,000 sq ft of small, workspace-type small office space.

5.46 Drivers Jonas consider that the first tranche of 10,000 sq ft should be built at Bessingby to satisfy the need for grow-on space and to free up the existing entry units. DJ also suggest that an effort be made to improve operating conditions in the town centre – and explore the potential (probably requiring some public sector financial support) for providing a mix of workspace-type and small own front door offices in the town centre.

The Spa Royal Hall

5.47 Pan Leisure/ Drivers Jonas argue that demand for the Spa's services will depend on the extent to which the quality of the offer – both the Spa's facilities and how they are managed and marketed and the supporting facilities in the town, especially in the accommodation sector – is maintained or upgraded. We stress that the forecasts of tourism spending and employment already set out assume that there will be sufficient investment in the Spa to allow it to maintain market share.

5.48 Pan Leisure/ Drivers Jonas conclude that the Spa's condition and facilities (including catering, IT, break-out room support and general condition) are substandard and currently impinge adversely on its competitiveness. Pan Leisure/ Drivers Jonas also conclude that the Spa's competitiveness is compromised by Bridlington itself – particularly by the limited choice of accommodation, coupled with shortcomings in the town's accessibility (two-lane highways, congestion in season).

5.49 The Spa has an established niche in the association conference market, but is unlikely under any scenario to be able to compete in the larger and faster growing corporate conference market. The exhibitions market is growing; again the Spa has a presence but new facilities in the region (e.g., Sheffield Arena, Leeds' Royal Armouries) have intensified competition. The audience for live concerts is growing, and the Spa is a favoured regional venue and sells out for popular groups. The pub sports market continues to grow, and again the Spa is competitive in the market. The Spa's theatre, although relatively popular for touring groups, is larger than necessary; its size diminishes its appeal to the touring theatre market and limits its value to local performance groups. Pan Leisure/ Drivers Jonas suggest that reducing seating capacity to 600 would be better.

5.50 Pan-Leisure's conclude that there is growth potential in each of the Spa's principal markets – association conferences, events, exhibitions, pub sports and concerts – but that there is also very substantial and growing competition for the same markets, most especially from York and Hull, but also Scarborough. Pan-Leisure conclude that if the Spa is to retain market share – or even retain current levels of business – investment will be needed, most particularly in interior and external decoration, lighting and electrics (sound, IT etc.).

5.51 Pan Leisure/ Drivers Jonas examined six options for the Spa and recommended a scheme for refurbishment that would upgrade the entrance, the Hall and the theatre, create breakout rooms, produce a fully revamped function room, upgrade electrics, lighting and related technology and refurbish the lavatories. This is the lowest level of redevelopment that Pan Leisure/ Drivers Jonas considered would be sufficient to allow the Spa to hold its position in the market (and permit some growth)This would have left a more extensive refurbishment and extension until a later date (when the marina and associated hotel development may be established).

5.52 Following this recommendation resulted in the preparation of an initial 'concept scheme' by Drivers Jonas for public consultation in 2004 and this in turn informed the brief for the Spa Refurbishment Scheme which is currently under construction and due to complete in early 2008. The detailed development of the 'concept' scheme uncovered fundamental issues regarding the technical feasibility of the existing building to deliver what was required to meet current legislation and the aspirations of the project within it's physical limitations. Subsequent development of the scheme has resulted in a design which incorporates elements of extension and reconstruction to achieve a significantly higher level and more flexible facility than originally identified as the 'minimum' acceptable course of action. The Spa will be a genuinely multipurpose conference, events and entertainment facility capable of attracting and servicing the widest range of conference events and extending its markets whilst retaining established trade.

5.53 We accept Pan Leisure/ Drivers Jonas's conclusion that any significant improvement in the Spa's competitiveness will depend additionally on improvements in the appeal of the town (in particular the accommodation offer and being able to attract a good quality hotel). The enhanced level of redevelopment of the Spa greatly exceeds the ‘minimum’ scheme recommended by Pan Leisure/Drivers Jonas and it is expected to help build confidence and interest needed to trigger additional investment and development in the town, which in turn will benefit the Spa.

Leisure World

5.54 The demand for Leisure World is generated both by residents and visitors – as a year round community sport and recreation facility for local residents and a visitor and wet weather attraction during the holiday season. About a third of annual use occurs during the three summer months, suggesting that the holiday season has only a modest impact on usage, and this occurs mainly in August. Thus it is fair to conclude that although Leisure World has some value as a tourism attraction, its main utility is as a community facility.

5.55 Year on year utilisation figures suggest an annual rate of growth in use of about 3% (although income has been static over the last three years). The wet facilities account for almost two-thirds of the usage and half of income, and the vast proportion of this use is by families and others for causal swimming (as opposed to club, school and instruction use). Use of the dry facilities (sport and recreation that take place in the multi-purpose hall and 3Bs) account for 24% of the use; and the social facilities for 14%. Although the bowls facilities are popular, the facility cannot host official events because the facilities do not meet league standards.

5.56 As with the Spa, future demand will relate to the standard of the facilities and the services on offer – although because its main market is local, it is largely captive. As long as the swimming pool in particular (but also the gym, the other health & fitness provision and the bowls) is the only such facility in Bridlington, it is difficult to envisage that its use will diminish. Indeed, population growth suggests that usage will increase.

5.57 As with the Spa, Pan Leisure/Drivers Jonas recommend investment in improvements (which will be needed in any case to comply with Health & Safety and Disability Act regulations) in order that Leisure World maintain its market share. Of six options considered, ranging from doing nothing to minor refurbishment (£4-4.6m) to complete new build on site (£23m), Pan Leisure recommend spending £4.6m to bring the facilities up to standard, with the main share (52%; £2.4m) on essential maintenance, and the rest on refurbishment of the reception and health and fitness area.

5.58 The consequence of this spending would be to increase, on Pan Leisure’s estimates, annual revenues by year three post-investment, by about 1% and FTE jobs by 3 (over the current 40 FTEs).

5.59 It would be impossible to isolate the individual impact of the increased utilisation of the Leisure World on the competitiveness of the tourism economy. Indeed, the greater importance of Leisure World is its value to the community – and the argument for investment in the facility should be framed is that context rather than its contribution to the town’s economy. Nonetheless, we take the view that a town of Bridlington’s size and importance should have good municipal swimming facilities – and that these facilities, like everything else in the town centre, should look good.

Demand for Marina Berths

5.60 Scott Wilson have estimated prospective demand for moorings. The details of their assessment are set out in their report. Very briefly, they conclude that there is a case for 500 berths. Demand is a combination of:

- demand arising from existing uses of the harbour (about 50 berths);

- relocations from other marinas attracted by one or other or a combination of price, location, facilities, better boating conditions and the standard of marina management, amounting to about 190 berths;
- forecast growth in demand for berths arising in the wider region (up to 380 berths to 2008 and considerably more after this date;
- visiting cruisers, which would increase with the addition of marina facilities at Bridlington; and
- latent demand – including the opportunity with a marina to run more events.

5.61 Scott Wilson also point out that it is cost efficient to build for the 500 – as some 80% of the cost is sunk for a marina just half this size. Additionally, the larger size produces scale returns on management costs.

5.62 Thus Scott Wilson are confident that their estimate is robust, and advise that 500 is the optimum target size.

Fishing Facilities

5.63 Discussions with the fishermen are in progress – and ultimately decisions on the facilities will be a matter of negotiation. Better repair and landing facilities are required, and box washing and bait storage facilities need to be upgraded. The fishermen also say that they need four to five times more outside storage space than they have now, need more covered storage space, needed larger and better storage tanks, and would like chilled or freezer facilities.

Demand Summarised

5.64 In summary, we estimate the following prospective demand, providing the necessary supply side criteria exercised by the different investment and occupiers are met:

- Up to about 800 flats in the town centre over the period between 2004 and 2016, averaging between 50 and 80 completions a year;
- 6,000 – 8,000 sqm of own front door and workspace-type small offices, with some provision at Bessingby and most in the town centre;
- 30,000 sqm of additional retail and ancillary leisure floorspace in the town centre in the period to 2016 (see separate retail demand study);
- a 29% growth in staying tourist trips, with a 4% increase in staying nights and a 5% increase in expenditure over the 2002-2016 period;
- an increase in tourism day trips of 15% with an equivalent increase in real spending over the 2002-2016 period; and
- 500 marina berths, plus commercial facilities to support the local fishing industry.
- Housing demand – flats in the town centre.

Employment Effects of Forecast Demand

5.65 Overall we estimate that employee employment in Bridlington will increase – without any concerted effort to regenerate the town – by 12% over the period 2002-2016 (+2,230 jobs.

5.66 With a concerted regeneration effort – the ‘policy-on’ scenario – including the investment in a marina, improvements to the town’s accessibility and general appeal, the improvements to the Spa, the provision of the proposed business space and the work to improve the competitiveness of the accommodation offer – we forecast that employee jobs could increase by 15% (adding, net, 650 further jobs, net, of which the major share – 61% – is attributable to employment growth in population-related activities in public administration, health and education). .

5.67 The greatest potential increase in jobs, however, would be associated with the development in the town centre of the quality and appeal of retail and related leisure floorspace needed to clawback lost spending and capture forecast growth in spending and population (redeveloping the outworn and shabby parts of the town centre to do so). The provision of around 30,000 sqm of new retail and leisure floorspace by 2016 would create in the order of 1,900 net additional jobs.

5.68 We believe that the commitment to a marina or at the very least a significantly changed harbour area, however, would be a necessary condition to securing the needed risk investment in the town centre redevelopment.

6 THE PERFORMANCE ANALYSIS SUMMARISED; THE VISION, OBJECTIVES AND CANDIDATE PROJECTS

Introduction

6.1 We set out in this section the conclusions of our analysis of Bridlington's performance as a local economy, focusing on the factors – including the market failures – that explain why it performs as it does, and on the assets and other opportunities the evidence suggests offer prospects for improving local prosperity. Our aim is to identify where investment by the public sector is likely to be most cost effective in removing the obstacles to the market's performance and stimulating the needed risk investment by the private sector. As we have shown, Bridlington's is deficient in well-being: there are too few jobs and average earnings are low. These deficiencies are persistent and worsening – but are occurring against a background of sustained population growth in the town and within a wider sub-regional economy that is performing above regional averages. People like living in Bridlington, and it is in this affection for the town and the determination to make it better that the seeds of its future lie.

6.2 We conclude this section with the framework of the Strategy for regenerating Bridlington: a vision for the town, the objectives for change and the candidate projects for achieving the objectives. Finally, in Section 7 we outline the Regeneration Strategy, put forward the short list of projects, set out our assessment of their prospective value to meeting the objectives of the Strategy and advise on their delivery.

The Performance Analysis – the Summary

The Causes of Under-performance

6.3 We first summarise briefly, drawing together the various strands of the performance analyses, the findings on the causes of market failure and the other factors that help to explain where and why Bridlington does less well than its size, wider economic circumstances, asset base and natural endowments suggest it should. As explained in Section 1, there is a certain amount of inevitable circularity in this kind of analysis. There are two aspects in this. First, the outcomes of a previous period become the inputs of a successive period, so there is some difficulty in defining at any given time what are outcomes and what are inputs. Second, there are feedback effects which mean that for some places a virtuous spiral helps to drive both outcomes and context up, whereas for others a vicious spiral drives both context and outcome down. Nonetheless, accepting the limitations, there is considerable utility in attempting to link the string of factors which help to establish cause and effect.

6.4 We conclude that the principal factors that explain Bridlington's comparatively poor performance as a local economy are:

- Little representation from growth sectors of the economy, partly a function of the comparatively small size of the catchment and distance from market concentrations, partly because of the nature of the local labour market and partly the effect of the slow response to structural changes in the economy (declining manufacturing sector and shrinking core tourism market). But the chief factor is the failure of the local economy, in response to these structural shifts, to attract a proportionate and compensating share of the spending in consumer, professional and other business services generated by the local residential and corporate market.

- The principal explanatory factor for this failure appears to be shortcomings in property supply, trading conditions, accessibility and the general appeal of the town centre, affecting both the consumer and business services sectors.

- These shortcomings in turn are explained by: the pattern of land ownership, including significant land holdings by owners who do not respond to normal commercial criteria; and the adverse impact of the seasonal activity, which is dominated by high volume, low spend visitors.
- The seasonal surge places great pressure on infrastructure, causing traffic congestion, town centre management problems and dominating the retail and catering offers. The seaside attractions impinge adversely on the normal commercial activity of the town, imposing adverse externalities on neighboring uses during the season, when the attractions are heavily used, and out of season when their under-use or closure gives large parts of the centre an abject, ‘closed for business’, appearance and very sharply reduced footfall.
- Local residents and businesses are deterred from using the town centre during the season, and have become habituated to going elsewhere out of season, causing a downward spiral in context and outcome. Market failures abound – externalities, risk of free riders, imperfect knowledge, cartels and monopolies – exacerbated by weak town centre management and a policy environment which has tended to put tourists first.
- The retail offer is small, poorly laid out and dominated by out-moded trading units; there is no retail circuit; and the retail offer is adversely impinged upon by the seaside attractions offer.
- The very limited business and professional service sector in the town centre reduces the potential for advantageous spill-overs.
- The core tourism market is shrinking, but the historic reliance on this low margin sector makes it difficult for local business to respond with the necessary risk investment to move into other, more profitable visitor markets (short breaks, specialist interest).
- There is substantial competition from other parts of the region (York, Leeds, Hull and the countryside offer) to attract the needed risk investment in the facilities valued by the more lucrative AB1 markets (good accommodation and restaurants in particular).
- Catch 22 in the accommodation market: dominated by poorly managed, shoestring small businesses (who have not responded to shrinking traditional markets by moving into new ones); supply is poor quality, so not an inducement to visit; lack of higher spending visitors diminishes willingness to invest to attract these.
- Catch 22 in the business space market: supply is short because values are low; values are low because demand is low; and demand is low because supply is short; exacerbated by stocks of out-moded buildings which drag on the market; imperfect knowledge obstacles to market performance (banks willing to lend; demand in the small space market willing to pay economic rents; partners available to share risks and rewards for the right scheme).
- Comparatively poor skill levels in the labour force, not compensated by in-migration, coupled with relatively poorly performing schools.
- A skewed age structure – fewer young and working age and more retired.
- Out-dated, old fashioned facilities (owned and operated by the public sector which again does not respond to normal commercial criteria) that fail to meet tastes of the growing sectors of the tourism market (Spa, Leisure World, accommodation).
- Serious access and severance constraints, affecting the ease of getting into and out of the town centre and parking once there, and deterring visits most particularly by residents.
- Relatively poor legibility of the town centre and the town’s assets (relationship to the Old Town, Sewerby Hall etc.; Gypsy Race hidden; harbour unappealing etc.).
- Poor marketing, still pitched at the C2DE high volume, low value seaside visitor – even now, despite market shrinkage.

- The retail and leisure offer still caters to the least demanding sectors of the market (so is not responding to rising expectations of standards) and therefore fails to meet the expectations of the higher spending markets it would otherwise be able to attract.
- The town's relative remoteness and lack of strategic highway infrastructure.

6.5 All of this is compounded by:

- A plan form – with the disjuncture between the Old Town, the station area, the town centre and the Spa via the harbour – which reduces legibility and appeal;
- The lack of a clear retail circuit to concentrate and direct footfall, which is necessary to support a larger area of prime and a healthier network of secondary and tertiary streets; and
- The lack of a distinctive, marketable, more fashionable image – made more difficult by the condition of buildings and the poor quality of the public realm (except for the esplanade).

6.6 All of this adds up to the failure of the town centre to offer the unique and compensating advantages of an 'urban' location – as a shopping and leisure destination, as a higher order locus of leisure and cultural activity, as a higher order business location, and as a lifestyle offer.

6.7 Indeed, the failure to provide these advantages appears to be the single most important factor explaining why Bridlington as a whole performs less well than its seaside counterparts and the wider sub-region within which it is located.

The Principal Assets and Other Opportunities

6.8 The principal assets and opportunities to exploit, and that would appear to offer the prospect of improving Bridlington's competitive advantage, are:

- the popularity of living by the seaside, demonstrated by strong-ish population growth and robustness in the housing market;
- the town's comparatively diverse economy; there is just too little of everything and not enough representation from growth sectors;
- a beautiful natural environment, clean beach and beautiful hinterland close by – both as a setting and as a resource for stimulating a more diverse leisure offer (sports, health, nature etc.);
- a compact town centre – and linked to promenade;
- Gypsy Race – but hidden;
- some heritage, including in the centre (it is just despoiled or not revealed– e.g., the harbour);
- established association conference market;
- large self-employed sector (some evidence of entrepreneurial culture);
- sheltered bay – an advantage on North Sea coast;
- good sailing, couple with growth in the sailing market;
- harbour (but massively under-utilised, plus a monopoly operation);
- Spa – has captured specific markets which have some growth potential if its facilities are brought up to scratch (indie bands; pub sports; association conferences; special events) – plus more potential for servicing the catchment's needs (community theatre, association meetings and events, local business exhibitions and conferences etc.).

- Leisure World – enthusiasm for swimming growth in health & fitness; treatments; together with the fact that there is little (at present) commercial competition;
- popularity of bowls – which may be catching on in a younger market, but the facilities in the town (including at Leisure World) fall short of tournament-quality specification;
- the Old Town, but it is important that its private sector-led renewal does not dissipate – but need to be careful re dissipating the market for shopping, food & drink etc;
- other things to do – e.g., Sewerby Hall.

Other Opportunities

6.9 In addition, there are a range of related opportunities, over and above correcting causes of under-performance and exploiting assets:

- re-capture the lost expenditure and the spending that will come through growing population and continued growth in spending on retail and leisure in the catchment
- the growth in grey pound spending – but the baby boomers coming up are a more sophisticated market (that could be planned for)
- the potential to develop an in-town residential market – a small, but important, segment of the local housing market – and to use this more sophisticated end of the market to provide an in situ basis for a more sophisticated retail and food and drink market
- the growth in activity and special interest holidays, coupled with the town's natural asset base, including the growth in sailing and leisure boating
- a marketing and image campaign – but when the product has improved – and including 'cluster' approach (collaboration with Scarborough and Filey for example)
- the shellfish industry – both in reducing the adverse impact on the town centre with better facilities and in exploiting the value of the industry for the local retail and food and drink offer
- fish industry – value-added wholly unexploited to date
- self-employment and enterprise, building on success of Bessingby Business Centre and high and growing rates of self-employment

Vision

6.10 Drawing on the evidence of Bridlington's prospects, and the factors which needed to be addressed to remove the deterrents to its ability to realise its potential – and listening to what we have learned from the town's residents and businesses – we put forward this vision:

Bridlington: a nice place to live by the seaside. Visitors welcome!

Why this vision?

6.11 The vision puts the emphasis on the right market, and a growing market, for the town: those who live and work and run businesses in Bridlington and should look to it to meet all but their higher order shopping, leisure and cultural needs.

6.12 Making Bridlington a much nicer place to live – and giving it the quality and appeal of town centre that a town of its size and spending power deserves – will also make Bridlington a nicer place to visit. The evidence shows that this is the easiest, least risk way of improving the value of tourism to the economy.

Strategic Objectives

6.13 The overarching objective for regenerating Bridlington is to create the missing well-being: creating enough jobs to bring the labour market into balance and raising incomes so they are in line with the regional average.

6.14 Given the market failures that require correcting, the other causal shortcomings (inter-related chains of feedback effects) that need to be addressed, and with the assets and opportunities we have identified, we put forward the following operational objectives as the framework of the Regeneration Strategy:

i) Reinvigorate the town centre – improving public realm, zoning the seaside attractions, providing more and a wider choice of shops, especially fashion, and new places to eat and drink; a choice of attractive places to sit, gather and contemplate; and facilities in the town centre to support the community life of the town (including amateur theatre, local associations etc.).

ii) Take advantage of the harbour and its location adjacent to the town centre to create a setting for the new retail and leisure development for the town centre and to provide part of the impounded waterspace needed to create a new marina.

iii) Create a new marina to provide for water-based activities, including sailing and fishing, and to provide a suitable setting for the Spa and development related to it.

iv) Create a good quality, stylish town centre residential offer targeted at a range of markets – capable of appealing to the young cohorts in the labour market; the lively end of the retired, empty nester markets; and to the more mainstream retired market and to empty nesters.

v) Make the town accessible and usable at all times of the year for its residents and businesses, increasing junction capacity where necessary, creating the infrastructure to divert traffic from the core, and increasing the amount of car parking and locating it where it will discourage circulation around the town to find suitable parking.

vi) Provide for a range of small business space to unlock the demand in the small office-based sector, both in the town centre and at Bessingby.

vii) Update the Spa so that it becomes once again the stylish landmark that it was in the town's heyday, enabling it to consolidate and grow its position in the conference, special events, concert and pub sports markets and providing a suitable inducement for encouraging hotel investment alongside.

Enabling objectives:

i) Assemble the land needed to create the size and quality of development parcel(s) that will attract the needed risk investment in shopping, food and drink, leisure, housing and hotel development in the town centre, well-related to the existing shopping core and to the harbour (and proposed marina).

ii) Actively promote Bridlington to the housebuilding industry – ensuring in the first instance (as well as creating the opportunities in the town centre) that brownfield land is developable and attractive to the market.

iii) Unite the Spa to the harbour and town centre.

iv) Open the Gypsy Race to provide a setting for development and an attractive pedestrian linkage between the station and the town centre core, taking what steps are necessary to ensure the Race does not dry out in the summer season.

v) Improve signage in the town, including to car parks and attractions in the town, to Old Town and to Sewerby.

vi) Provide a summer season and special events park and ride, working with the bus operators to ensure the provision of frequent, attractive services into the town centre and principal attractions (Spa, retail core, Leisure World, Old Town, Sewerby Hall etc.).

vii) Provide, as part of the town centre highways works, an inner 'relief road' to divert traffic from the core, both north of the core, and via Hildethorpe Way, to the south via the Spa

viii) Meet, where there is an economic case for doing so, the facility needs of the fishermen.

ix) Improve the appearance and landscaping around Leisure World.

x) Promote better quality food & drink, most particularly the town centre (e.g., through contests for chefs; a competition to run / cook for a new restaurant, rent free for a period etc., plus the potential of a joint effort with the fishermen to create a flagship shellfish restaurant)

xi) Actively promote new hotels in the town centre, both as part of the proposed town centre redevelopment and related to the Spa; a well-designed 2-3 star budget format would be a start

xii) Continue to work with schools to improve performance

xiii) Mount a brand/image campaign – as soon as a major project is on the stocks (marina; town centre development scheme) – targeting the higher spending markets, including within as well as beyond the region.

xiv) When product has improved, mount an investment marketing campaign.

xv) When product has improved, mount a refreshed tourism marketing campaign.

xvi) Set up and operate a 'tourism market intelligence' campaign for the town using mainstream local media (radio and the newspaper), the chamber of trade and the Rotary Club – informing townspeople of trends and spending patterns in the wider tourism market and locally, reporting how the town is faring compared to the region and other (partner?) seaside towns and disseminating what kinds of things businesses can do to perform better.[34]

xvii) Actively investigate the water sports market – what the demand might be for what kinds of facilities, what competition there is, what kinds of income could be generated and what steps might be taken to develop the potential and by whom

6.15 Above all, it is essential that the Partnership continue to build effective working relationships with the town's principal landowning interests and the Harbour Commissioners – the participation and willing joint working with both are essential predicators to change in the town.

[34] The Republic of Ireland provides a good model of how this can be done to effect.

Candidate Projects

6.16 The list of candidate projects identified in 2004 is as set out below. We provide here a short view of their potential value, explaining why and why not these have been taken forward or otherwise into the Strategy.

6.17 The candidate projects for achieving the objectives set, and ultimately for delivering the vision, are:

1. **Marina**. Subject to a full appraisal and the cooperation of the Harbour Commissioners (both as joint venture partners in the capital project and operators on completion), we feel that a marina is merited on the following grounds:

   - it is a major project capable (if properly designed) of altering the market's perception of opportunity in Bridlington, and in particular in the town centre
   - it enables the public sector to concentrate its investment to effect
   - it is capable of providing the needed setting to attract the necessary scale and quality of risk investment in the town, most particularly, adjoining the marina itself, hotel and food and drink provision and the Spa, as well as lifestyle housing
   - it can be linked to the town centre, both to the proposed redevelopment along the Gypsy Race, and to the existing core along the north side of the harbour
   - it would bring new spending into the town and particularly the town centre
   - it would allow facilities to be improved for the fishing industry
   - it would help to broaden the shoulders of the tourism season
   - it would provide a facility to increase the number of events in the town, particularly events which will appeal to higher spending visitors (also more demanding, helping to drive up standards in the food and drink and accommodation markets)
   - it could become emblematic of the new Bridlington
   - it plies markets which are growing

2. **Redevelopment within the town centre** to provide the needed retail floorspace and improved shopping offer and to create a substantial new residential offer, and if feasible, also workspace-style and/or own front door offices – redeveloping outworn and shabby parts of the town centre to do so. While detailed work is needed on how best to bring this forward, the fact is that it is the single most important project alongside the marina. Although some redevelopment would be feasible without the marina, it is the marina that will unlock the market's perception of opportunity and willingness to take a larger, bolder risk, achieve higher design quality and to move faster in delivering the scheme – all because development values will be higher. [35]

   The retail development is also the single largest opportunity to achieve the needed job creation in the town – and the only scheme that suggests that even the 'policy on', high growth employment forecasts could be exceeded (as they need to be if the labour market is to be brought closer to balance). A 30,000 sqm retail and ancillary leisure scheme by 2016 would create (net – because none of the forecast demand displaces turnover in other shops) some 1,900 jobs (in a mix of full and part time.

   The residential element is also critical: to diversify the in situ market, to increase population in the core (and in the town more generally), to create pressure on food and drink businesses to raise their standards, to create new retail markets for the town and to bring more family and friend visitors in.

3. **Access and parking improvements** to improve the year round accessibility of the town centre and manage the 'seasonal' surge, including:

[35] A next step will be to measure the uplift in scale and value generated by the marina.

- internal improvements to the town centre: improved traffic signing and junction operation, improved cycling and improved pedestrian links, plus further pedestrianisation and improvements to public transport
- town centre relief road to link to the proposed site of the new town centre redevelopment and divert traffic to the north and south of the core
- park and ride at Carnaby aimed at reducing the impact of seasonal traffic
- improvements to the linkage between the town centre and the rest of the town to encourage more usage of the town centre, plus the accessibility of the Old Town – along the Quay Road/St John's Street corridor and the Hildethorpe Road / Bessingby Road corridor
- improved car park signage
- improved car park provision – including a multi-storey (which the proposed redevelopment scheme could bring in, although detailed study suggests further parking is required in any event)

4. **Public realm scheme** to very greatly improve the appeal of the town's streetscape and public spaces and, critically, to manage the image and impact, in and out of season, of the seaside attraction offer (the funfair, the arcades etc.), using landscape, hard and soft, to zone the seaside attractions. Re-landscaping around the Spa is also critical, as the landscape that links the town centre core to the Spa.

5. **Business space:**

   i) **Bessingby** to unlock the need for grow-on provision – 10,000 sq ft (900 sqm) in the first instance, to be followed by a second tranche of 10,000 sq ft, unless this second tranche can be supplied in the town centre.

   ii) **Carnaby** to unlock the Catch 22 that is blocking the provision of light industrial and warehousing space, a speculative 25,000 sq ft (2,300 sq m) scheme sub-dividable into units of 2,500 sq ft., but subject to the outcome of the marketing of the Yorkshire Forward-owned Wyseplan site (i.e., if the Wyseplan site is sold *and developed* for speculative provision, there will be no need for the scheme).

   iii) **Business space in the town centre** to meet the needs (unmet by upper floor provision) for decent quality small units – in the order of 60,000 sq ft in the first instance, probably as part of the town centre redevelopment, although other potential sites need to be explored (a candidate may be the land to the east of Victoria Road behind Christ Church). Feasibility will rest in part on improving access into the town centre and parking (or providing sufficient parking with the scheme)

   ERDF funds, totalling £5.35 million including the match element, are ring fenced for these schemes.

6. **Spa refurbishment**. The recommended option was expenditure of about £4.1 million on works to improve and update internal and external condition, update electrics and sound systems, create and equip break-out rooms and generally improve the common public spaces – spending that is £2.1m less than that the £6.2m provision in the IDP (made up of ERDF and match funding both by the ERYC and Yorkshire Forward). Investment on this level would, on Pan Leisure's evidence, protect Spa's current market share and produce significant revenue increases, broadly stabilising the current levels of Council revenue support. However, following publication of the Strategy, project appraisal identified a need to address fundamental issues regarding the technical feasibility of the existing building to deliver what was required to meet current legislation and the aspirations of the project within it's physical limitations. Subsequent development of the scheme has resulted in a design which incorporates elements of extension and reconstruction to achieve a significantly

higher level and more flexible facility than originally identified as the 'minimum' acceptable course of action. The Spa will be a genuinely multipurpose conference, events and entertainment facility capable of attracting and servicing the widest range of conference events and extending its markets whilst retaining established trade.

7. **Leisure World refurbishment.** The recommended option is the investment of about £4.6 m in the facility to improve the reception area and health & fitness facilities, the effect of which is to protect an important community facility and wet weather attraction during the season, the effect of which is to protect these markets and reduce marginally the annual call on the Council's revenue support.

8. **A range of options targeted on the tourism sector:**

    - Project(s) to develop the sub-aqua potential. Options include:
        - Artificial reef – there are projects elsewhere in the UK to create artificial reefs for sub-aqua divers, such as the sinking of the frigate Scylla off South East Cornwall (with a project cost of £1.2 million). This type of project raises the profile of areas as dive locations and can bring marine wildlife benefits
        - Tank re-filling facilities – allowing divers to replenish their air supplies means that the resort could attract overnight stays by divers. These sorts of facilities are relatively inexpensive and would commonly be operated through clubs or the private sector. There may be a case for local authority assistance with initial capital costs, subject to further research amongst dive clubs to establish requirements and likely benefits
        - Specialist retail – probably linked to tank re-filling, allowing further value to be gained from divers. There may be a role for the public sector to facilitate private sector operations
        - Education/research – there is the potential to link any artificial reef development with research projects by further or higher education establishments, which will further add to the activity as well as raising profile. The Scylla sinking involved the National Marine Aquarium and the University of Plymouth, for example.

    - **Business support**. There is a short term case for providing support for businesses (particularly accommodation and attractions, visitor retail and catering) which are seeking to develop and serve new, less seasonal tourism markets. This kind of scheme – based around the active provision of market information and feedback on the town's performance – would build on the support available through the Yorkshire Tourism Initiative and the SRB scheme in order to make more of an impact. It might be targeted towards extending the capacity of successful operators. A total of £0.55 million, including the match funding element, is included in the IDP programme for this work.

    - **Marketing** – in the near term to update the approach and say more to a wider market about what Bridlington already offers and exploring the 'cluster potential' with Scarborough and Filey. In the longer term a new branding and marketing campaign is needed to help reposition Bridlington and capture the new target market

9. **Public Art** – doing more of the successful esplanade-type intervention – perhaps as part of the proposed public realm scheme.

The Value of the Regeneration Strategy to Bridlington

6.18 Fully implemented, the strategy has the potential to create much-needed jobs. Job creation on this level would achieve the basic well-being objective of the Regeneration Strategy – bringing the labour market into balance, reducing unemployment and raising economic activity rates.

6.19 The Strategy for creating the jobs produces for Bridlington a very attractive and distinctive town centre, on a splendid natural and impounded waterfront, capable of competing for the spending of its residents and businesses, whilst meeting their service needs and providing for a very high quality of life, giving the whole of the region and beyond a wonderful place to visit.

6.20 The funding for the individual projects will need to be justified on their individual merits. But their primary value lies in their contribution to a cohesive strategy for the regeneration of the economy. The core of the strategy is the marina and the town centre redevelopment with the public realm scheme and the highway works. The Spa investment is needed to protect an important landmark for the town and an important source of spending and jobs – as well as an asset whose value will increase in the context of the marina and town centre schemes. The business space schemes are needed to continue the process of diversifying the town's economy, unlocking the catch 22 which is suppressing demand.

7 THE REGENERATION STRATEGY AND ITS DELIVERY

Introduction

7.1 This section sets out the Regeneration Strategy proposed for Bridlington, summarises the rationale for it, assesses its prospective contribution to meeting stated policy aims for the town (and producing the outputs needed by its funding partners) and advises on its delivery.

The Strategy

7.2 The overarching aim of the Regeneration Strategy is to bring Bridlington's labour market into balance and raise average incomes. The approach is rooted in best practice in regeneration (concentrating resources on major projects in order to alter the market's perception of opportunity) and is focused on correcting the factors that explain Bridlington's underperformance and taking advantage of assets that in both instances are amenable to change through supply side intervention. We have had regard in assembling and analysing this evidence for the feedback effects – the relationship between cause and effect factors – both the positive feedback effects to be created and the adverse chains to be broken.

7.3 For all these reasons, the Strategy is centred on improving Bridlington's ability to grow (sustainably) as an economy and as a place to live, by levering economic change that improves the competitiveness of the town in capturing the spending of its resident and business base. Although the town will – and needs – to remain an important tourism destination, the path to improving its competitiveness as a holiday destination lies in improving its value to those who already live and work in Bridlington.

7.4 The main planks of the Strategy are as follows, each of which adds value to the other, both in removing causes of under-performance, taking advantage of forecast demand and exploiting assets that offer competitive advantage:

1. **The development of a 500 berth marina, impounding with a single lock both the marina and the harbour**. The capital works must include the creation of development platforms and easy pedestrian access to link the northern and western flanks of the marina with the established town centre core and the proposed town centre redevelopment site. Although we estimate (see Appendix 2) that the marina, directly (as opposed to indirectly in its impact on adjoining development), will create no more than about 50 jobs, its impact on the town's future is much, greater – in terms of creating the conditions necessary for the needed risk investment in substantial additional retail and leisure development (including new, good quality hotel development) and in the 'lifestyle' residential accommodation in the town centre needed to diversify, and drive up market, the in situ customer base.

   But this additional value will only arise if the marina is planned in conjunction with the proposed redevelopment within the town centre and in conjunction with the improvements proposed to highways access and parking and to the appearance and functionality of the Spa.

2. **The redevelopment of (parts of) the land that lies between the station and the harbour along the course of the Gypsy Race** to meet the need in the town for further retail floorspace and shop units that retailers can trade profitably in, create a substantial new lifestyle residential offer and new, better ancillary food and drink offers. This development needs to be on assembled land, large enough to attract the necessary risk investment and meet the retail floorspace needs that will create the missing retail circuit in the town. The same redevelopment should, if it proves feasible, include provision for small, workspace-type, office space.

3. **The highways, access and parking works to allow better management of the 'seasonal surge' and to improve the accessibility of the town centre for the rest of the town**.

4. **Public realm and public art improvements in the town centre**, in two phases: now, but anticipating the marina and the town centre redevelopment scheme, and again as part of the construction of both, the inclusion of these in the scheme.

5. **The refurbishment of the Spa**, in the near term confining investment to the funds available through the IDP to improve the external appearance and landscape and interior redecoration and specification – reserving greater expenditure for later years once the marina is built and the town centre scheme is in place.

6. **Business space** – in the first instance the development of some 10,000 sq ft of grow on space (now) at Bessingby and in due course the provision of some 60,000 sq ft of floorspace in the town centre, coupled with the provision at Carnaby of 25,000 sq ft of speculative B2/B8 space.

7. **A series of soft measures designed to enable the town to capture the benefits, and distribute them fairly, of the major capital schemes**, including: a branding campaign once the marina construction is confirmed and the assembly of the town centre development site is committed and ready for marketing to the development industry; some reorientation and updating now of the existing tourism marketing material, plus some branding for the shellfish industry; a tourism information scheme targeted on businesses and designed to improve market information for local businesses (including information on competitors and why they are doing well, what lessons can be learned etc.) and provide feedback loops on local performance; and a series of promotional schemes to improve, and broaden the market for, the food and drink offer in the town centre (e.g., a cook-off contest with associated publicity).

7.5 We describe each project in turn below, and then summarise their ‘performance’ against the appraisal criteria which are appropriate at this stage of the Strategy’s development. Finally we set out our advice on the delivery of the major elements of the Strategy, including our advice on early wins and next steps, and conclude with an outline programme for going forward.

The Impoundment of the Harbour, a 500 Berth Marina and Facilities for the Fishing Industry

7.6 Scott Wilson assessed the prospective demand for a marina at Bridlington and the options for satisfying it that would also be capable both of overcoming the obstacles to securing consent and delivering value for money. Scott Wilson concluded that there is sufficient demand to a 500 berth marina, and found that the benefits of a 500 berth scheme, compared to a smaller option, outweigh the marginal increase in costs.

7.7 Scott Wilson were also asked to include amongst the engineering options a solution which incorporates the harbour as part of a marina, both to enable physical linkages with the established town centre core and to provide for the option of a partnership between the Council and the Harbour Commissioners both to deliver a marina and to operate it on completion.

7.8 Scott Wilson have investigated the engineering potential, and consider the option of a single lock to impound both the harbour and a new area of water to be feasible; they also conclude that such an approach, subject to suitable protection for the listed southern pier, should be capable of securing the needed consents and that it would be economic compared to other alternatives. The Council discussed this option with the Harbour Commissioners and their advisers, and the Commissioners agree that conjoining the harbour with a new marina offers the prospect of achieving the aims of both parties whilst also adding value to the marina for the benefit of the town. We also discussed at the same meeting the potential for the Council and the Harbour Commissioners jointly, each contributing their respective land ownerships, to secure the development of the landside area of such an option. Both again agreed that there are prospective advantages in this approach. We set out below our advice on how this might be achieved.

7.9 Scott Wilson examined three alternative locations for a marina: Wilsthorpe; north of the harbour; and south of the harbour. The Wilsthorpe option was dismissed on a range of grounds, including adverse environmental impact, reduced usability and questionable value to the town's regeneration. The northern option was dismissed on grounds of adverse environmental impacts. The southern location offered the potential of overcoming both these obstacles, plus the added merit of being within the existing built environment, offering the potential to provide improved facilities for the fishermen, allowing direct road access from the existing network and the potential of attracting visitors to the marina into the town centre.

7.10 All of the southern options examined were variants of the same basic approach: the construction of a new southern harbour; an amount of infilling to the listed south pier; some physical work to the fabric of both listed piers; and the modification and extension of the Chicken Run Jetty.

7.11 The options and the outcome of Scott Wilson's appraisal of them are as follows (Option 1 is the original marina that was refused). The costings are preliminary only, and allow for 3 hectares of made, dryside land.

- **Option 2: South harbour with a lock enclosing the existing fishing harbour,** including an extension to the north pier, with a constant water level in both harbours.

  Option 2 enables the maintenance of the south pier as a functional harbour pier, with no physical impact upon the structure; the listed slipway could also be retained if this proves desirable. The north pier would require waterproofing along its internal elevation and the construction of an extension to the south east (such an extension was considered to be acceptable by the Assessor of the original marina option). Both the northeast and southeast ends of the north pier would be affected by land reclamation, resulting in partial burial of the listed structure. New facilities and good access for fishermen would be feasible.

  Option 2 offers the best prospect of integration with the town centre and appeal to users and therefore a major beneficial impact on tourism, recreation and navigation. The impact on ecology and nature conservation would be minor, and the impact on archaeology and heritage, because of the impact on the setting of the south pier, would be moderate. Part of the northern section of South Sands beach would also be lost. There is a medium engineering risk associated with the works to the north pier and unknown condition of the structures.

  Cost = £35.4 million, including 10% contingency

- **Option 3: Separate south harbour**. A separate harbour to the south of the existing harbour, but wholly detached from the listed south pier and no development to the north pier, retaining the tidal harbour as now.

  There is reduced linkage with the town centre, and a risk therefore of creating a counter-attraction, there would be no contribution to the fishing industry and any adverse visual impact would be greater than Option 2. The independent structures reduce the engineering risks compared to Option 2, the impact on the listed structures would be the same as Option 2, but the loss of beach at South Sands would be greater.

  Not costed.

- **Option 4: 100 berth marina within existing harbour**. The existing piers continue to form the boundary of the harbour, with two new piers to enclose a new non-tidal marina in the northwest corner.

Although the harbour would be impounded, the 100 berths would provide no capacity for attracting visitors. Although facilities for fishermen would improve, access would remain poor. The impoundment would improve the setting for the town centre and therefore have a minor beneficial impact on regeneration. There would be a minor adverse impact on ecology and regeneration, but no adverse effect on the listed structures.

Cost = £10 million (BHC estimate, not Scott Wilson)

- **Option 5**: South harbour with lock and existing fishing harbour, with the fishing harbour retained as tidal, with part of the south pier obscured by land reclamation and new building against the east terminus of the south pier.

  Scott Wilson consider there would be benefits for the town through improved leisure facilities near to the town, but we consider that the retention of the harbour in its present, tidal state diminishes the value of the marina to the town's regeneration (although it would be better than Options 3 and 4). The additional mooring capacity increases user appeal and the scope for visitors. The adverse effects on the listed south pier would be greater than Option 2, and the loss of beach at South Sands greater. There would be a direct loss of littoral habitats and over-wintering wader habitat.

  Cost = £38.8 million, including 10% contingency

7.12 On the criteria considered, Option 2 is the better option, and Option 5 is the second preferred. We consider Option 2, on the regeneration criteria that are the primary justification for the marina, to be very substantially better than Option 5. Both, however, merit further study, with Option 5 the pragmatic fall-back if the necessary working relationship with the Harbour Commissioners cannot be agreed.

7.13 Figure 7.1 shows a sketch of Option 2 in plan together with a provisional layout of land uses and linkages to the town centre and Spa (Figure 7.1 should be read in conjunction with Figure 7.2, which we discuss below). The arrangement of land uses assumes that the major element of the forecast retail demand, as well as a substantial share of the forecast market for residential development, will be on brown land assembled for the town centre scheme. The predominant use around the marina's perimeter would be the supporting activities need for the operation of the marina[36], together with the food, drink and other leisure uses that capitalise on the marina setting, including hotel use in relation to the Spa.

The Quantum of Made Land

7.14 Scott Wilson state that the minimum dry side land area needed to support a 500 marina berth marina is three hectares. Although the final decision on the amount and configuration of made land will await the outcome of the further work on the development potential of the town centre site, the principles are:

- Sufficient made land (over and above that needed to support the operation of the marina and meet the needs of the fishermen) to ensure that, together with land that can be assembled within the established town centre, there is sufficient land, well-located to the marina, to support all the forecast development potential for leisure and residential use. Above all, a counter attraction to the town centre must be avoided, given the urgency of dealing with under- and poorly-used land and property in the town centre.
- Sufficient land to provide for the parking needs of the marina (0.75 spaces per berth = 375 spaces for 500 berths) and to service the parking needs of the development alongside the marina. While parking provision will be controversial, the fact is that Bridlington is not easily accessed – certainly

[36] Marina administration and harbour master offices; lock control building; RYYC club house; ship lift; slipway for larger boats; navigation aids, lighting for safety and security, electricity and sockets for each berth; drinking water; showers, changing facilities and lavatories; trolleys for unloading boats from cars (1 per 20 berths = 25); fuel berth; disposal facilities; chandlery; bar or club; boat care and valeting; sailing school; and boat sales and chartering.

by the higher spending markets the town needs to attract – by public transport. If parking is unduly limited, the value of the marina investment to the town will also be limited.

- Sufficient land to provide a setting for the Spa and to accommodate the footprint of a 100 bedroom hotel as and when such a hotel might be attracted to the town (80-100 bedrooms is a typical economic scale for a well-specified, budget type facility – leaving the Spa to provide large dining rooms and so on).

7.15 It might be an option to reserve land for a further tourist attraction (e.g., an art gallery or another museum), although the risk that such an attraction might not be forthcoming needs to be anticipated. A better approach, in reaching a decision about the quantum of made land needed, is to include in the quantum a land parcel which might alternatively be developed for, say, housing if a new attraction proves infeasible within a reasonable period of time.

7.16 While it may seem wise, if the marginal costs are low and there are few risks to achieving the necessary consents, we would caution against it. Long empty land adjoining the marina will diminish its user and visitor appeal, and the relative ease of developing the made land, against the greater difficulty and costs of assembling land in the town centre itself, will only increase the risk either of failing to achieve critical mass in either location and, worse, further eroding the town centre's competitiveness in its core residential markets.

Town Centre Redevelopment Scheme

7.17 In 2004, the proposed town centre redevelopment scheme was expected to entail:

- the provision, to capture forecast spending capacity in the period between 2006 and 2011, of up to 24,000 sqm of new comparison retail floorspace together with some 2,400 sqm in ancillary food, drink and other leisure/entertainment floorspace.[37] The retail floorspace needs to meet the requirements set by multiple retailers for efficient trading, and the scheme needs to create the missing retail circuit within the town centre – and thus must link to King Street/Prince Street across Prospect Street/Manor Street and to The Promenade precinct.
- the provision of some 200-250 flats, well-designed and architecturally distinguished but in keeping with Bridlington's character, capitalising on the potential to provide many with sea views and targeted on attracting new 'lifestyle' markets into the town centre – young people in the pre-family stages, empty-nesters, users of the new marina and 'urban families';
- workspace-type and own front door small offices – with a target provision of 6,000 sqm – coupled with associated parking, aimed both at the local professional and business services sector and the same SME market catered for at Bessingby;
- the re-opening of the Gypsy Race (where this proves cost-effective), partly to provide part of the setting for the new development, but also to provide an attractive foot- and cycle-way between the rail station and the town centre core, and between both of these and the harbour with the new marina. The project will need to include the works necessary to maintain water levels in the Race during the summer months and other dry periods.

7.18 Subsequent more detailed work on the retail and housing potential has informed a revised target use mix and quantum which is described in the Pre-Submission draft AAP.

7.19 The area of search for the scale and configuration of development site that will accommodate the forecast demand – and which has the necessary relationship to the existing retail core and the harbour

[37] The ancillary leisure figure is only a guideline – and acknowledges that modern retail schemes require an element of this kind of activity to make them viable and attractive. The leisure figure excludes any estimated demand for hotel, cinema and casino facilities.

– is the arc of land that lies between the station and the harbour and town centre, and sandwiched between Prospect Street and Hildethorpe Road but crossing Bridge Street to take in the harbour and the land and property along its northern flank. Figure 7.1 shows the area of search together with the relationship to the existing core, the harbour and the proposed marina..

7.20 The Council already has a number of land ownerships within the area – including the coach park site, the Exchange car park and the harbour car park. The Council's aim should be to join forces with the other principal land owners in this area of search (the Lord Foefoes and the Harbour Commissioners) to assemble the main part of the land needed for the development and to acquire the remainder – and then jointly to offer the opportunity to the market via a development competition. The preferred route is to acquire the remainder of the land needed by negotiation but, if this does not prove feasible, to acquire it by compulsory purchase using the Council's powers under the Planning Act. We comment below on the land assembly process – including the preferred partnership vehicle and approach to the market, what compulsory purchase entails should it be necessary – and set out our advice on taking the project forward.

7.21 The town centre redevelopment scheme is both essential and urgent – for all of the following reasons:

i) Development land is needed to capture the job creation potential of the marina: it is the prospect of job creation, on a sufficient scale to bring the local labour market into balance, which is the justification for the public sector's investment in the marina. Much of this potential lies not in direct job creation, but in the marina's appeal as a setting for the kinds of new development (and activities) that will create the needed jobs and which, without the marina, are unlikely to come forward.

Clearly, the development will need to be for uses for which there is demonstrable demand *and* upon which the future competitiveness of the town centre depends. Both are necessary; the first to ensure the deliverability of the development and the latter to justify the public sector's intervention (in removing the costs and other deterrents that explain why the market would not create the opportunities unaided).

Reclaiming land to accommodate this development is an option – but is defensible in public sector spending terms only if the existing town centre cannot accommodate the desired and deliverable scale and mix of development, *and* if the reclaimed land and development upon it can be sited so as to benefit, and not pose a risk to, trade in the established town centre core.

The prima facie evidence suggests that much of (albeit not all) the needed and desirable development can be accommodated on land that is under-used, poorly-used or simply down at heel[38] within the town centre; and that this land stands a much better chance of being well-related to the existing retail core and the harbour than reclaimed land that can only be sited well to the south of the established core. And because both obtain, it would be difficult to justify any substantial additional land as part of the marina if it can be proved that the town centre redevelopment is deliverable. There is a strong prima facie case that it can be, and we set this out below – but caution that it remains to be demonstrated.

ii) Bridlington needs, even to retain its present (much less than optimal) position as the principal destination in its catchment for comparison goods spending, to provide another 24,000 sqm of retail floorspace in the town centre in the period to 2011, and another 14,800 sqm in the period from 2011 to 2016. If Bridlington is to succeed in attracting the multiple retailers that are essential

[38] Land and property gets into this state for a range of reasons, including problems of adverse externalities caused by inappropriate or badly behaving neighbouring uses, small sites incapable of attracting renewal investment, uses located sub-optimally for their markets and therefore operating inefficiently/not profitably enough to generate funds for renewal investment and so on. It is an important part of the regeneration to remove the factors that cause this kind of thing. Poorly maintained, sub-optimally used, land and property is a drag on the competitiveness of the whole of the town centre.

anchors to the town's independent sectors, the floorspace needs to be provided in large enough units of the right shape to allow the multiples to trade efficiently; and this provision, in turn, needs to be capable of attracting strong footfall. All this means that the new retail scheme would need to be of a certain critical mass in scale, and located so as to create, with existing provision, a logical shopping circuit in the town (to channel and concentrate footfall across the 'prime' shopping frontage, allowing secondary streets to trade off the back of the principal pedestrian flows).

iii) Too much of the town centre – whose principal job is to service its catchment markets – is adversely affected by the seaside attractions, compromising its ability to attract the level of spending from its catchment needed for its vitality and viability. Extending the core away from the esplanade would create the space needed to zone the activities – to the advantage of both. The core shopping activity would benefit both from being sheltered out of season from the harsher effects of the weather and from being distinct from the abject 'closed for the winter' appearance of the esplanade and fun fair site. During the summer, catchment shoppers can carry out their activity with less pressure on facilities from the beach visitors, fish and chip shops, fun fair, amusement arcades and so on – helping to mitigate one of the key reasons locals avoid using the town centre in season (which in turn habituates them to using other centres all year round). In turn, the seaside area would be freer to expand as necessary to meet the needs of its particular customer groups. (We set out below how a public realm scheme could be designed to assist this zoning of activity.)

iv) The town centre needs a larger and more diverse residential offer – most particularly aimed at the small, but important, lifestyle end of the market – to provide an in-situ and more demanding customer base for the town centre's retail and food and drink offer, to diversify the town centre's evening economy, to provide beneficial social pressure and surveillance, and to give the town some good quality, contemporary architecture.

v) There is insufficient development demand in the catchment to create two viable and vibrant centres of activity within the town. Thus it is essential that the marina and the development it attracts be well integrated spatially and functionally with the town centre offer – producing the opportunity for creating needed critical mass in the appeal of both (provided the access improvements are also carried out, ensuring that the critical mass can function). This is both a lesson learned from the inspector's decision on the original marina inquiry and good regeneration practice.

vi) The town centre should be able to offer advantages, arising from compactness, easy access, efficient inter-trading, clustering and beneficial competition, unavailable in any other location – but does not optimise this capability. New development needs to capitalise on these capabilities and create the pressure on areas of 'prime' needed to raise development values and make renewal feasible.

7.22 While considerable further work is needed (we outline the process below) to identify the best balance between a commercially attractive, a financially viable and a deliverable site, the following are the de minimis requirements:[39]

- The footprint must be capable of accommodating a retail scheme that will appeal to the target retail occupiers – principally fashion multiples. To do so means the site needs to have the right footprint (to permit the right size ground floor trading area), room for an anchor (probably a variety store trader) in the right position, and good enough connections with the established shopping core to establish the missing shopping circuit.
- The site must be large enough to attract the scale of risk investment (and quality of developer) needed to realise the potential of the town centre.

[39] That is, the criteria that any site solution will need to satisfy if the development of the land is to achieve what is needed.

- The development needs to take advantage of the 'desire line' created by opening up the Gypsy Race and its landscape potential, taking advantage of the landscape potential of the Race. site needs to optimise the potential for using the fall in the land from the station.
- The development needs to join with the harbour across Bridge Street, and either include, or anticipate, the development of the land to the west of the harbour.
- The site needs to be capable of comprehensive planning and delivery (we describe what this entails below).
- The development site needs to allow full advantage to be taken of the fall of the land from the station to the harbour, and the development on the site needs to be required to take full advantage of the land fall to increase its drama, maximise sea views and ensure scale and massing in keeping with Bridlington's distinctive character.

7.23 The deliverability of the development (and achieving the regeneration of Bridlington) will rest on the Council's ability to use its own land holdings to advantage. It is absolutely critical therefore that the Council not sell its land in the area of search – nor support any piecemeal development of any type in this area, or elsewhere, that might impact adversely upon the development potential of this area. The coach park site, the Exchange car park site and the harbour car park land are all critical components. Even if, for example, the coach park is not part of the site ultimately assembled, it is an asset that might be swapped for other land and property that is better located in respect of the established shopping core.

7.24 We explain below (in the sections on land assembly and risk) the reasons that the Council's land is so very important to the regeneration of the town centre, and why the development value of the proposed 'area of search' lies in a comprehensive approach to its planning and delivery.

Highways and other Access Improvements

7.25 Six schemes to address the obstacles to the town's economic recovery and long term prosperity imposed by access constraints and the impact of the 'seasonal' surge' are central parts of the Regeneration Strategy. The total cost of the package is in the order of £6.5 million – but can be phased so that the first tranche could go into the Local Transport Plan as a 'major minor' scheme of less than £5 million. We explain further below at paragraph 7.24 together with our recommendations of the elements to be worked up and taken forward in the LTP for 2005/6.

7.26 The proposed schemes, together with the results of WSP's appraisal (but prior to the results of their modelling work):

i) Internal improvements to the town centre. This package of improvements includes relatively low cost solutions that could be delivered over a short timescale aimed at reducing the impact of car based trips in the town centre, in particular to better manage the impact of seasonal traffic. Potential schemes include better traffic management through improved traffic signing and junction operation, improved cycling and pedestrian links. The potential for more pedestrianisation and public transport provision was also included.

The partial pedestrianisation of Manor Street would still allow bus use, although through traffic would be banned). Traffic could potentially use Beck Hill as a new alternative route to get round the town. The pedestrianisation would allow a 'central square' to be created allowing a traffic free environment between King Street (already pedestrianised) and Manor Street.

The siting and standard of bus stops in this central area should be improved to increase the appeal of public transport use as well as to improve the circulation of buses; transponders could also be used to reduce bus delays at junctions.

The proposal is low risk, deliverable and offers good value for money.

Cost = @ £0.25-0.5 million

ii) Park and Ride. The proposal is a Park and Ride scheme, located at Carnaby Industrial estate, and aimed primarily aimed at reducing the seasonal impact of traffic in Bridlington town centre. Although technically feasible, we understand there is some uncertainty over political and public acceptance of the scheme. A study of the benefits over costs (an assessment on Department for Transport rules required by the LTP process) resulted in a predictably poor cost benefit ratio (because the rules require the assessment to be annualised, thereby penalising schemes where benefits are concentrated into a short seasonal period). Operators have also expressed concern over the seasonal aspect – they prefer to operate P&R over a full year as this maximises their fleet utilisation – and would be need incentives to provide a peak summer service only, thus raising the cost side of the ratio. P&R to work would need to operate frequent services (maximum 10/15 minute wait time), and the distance between the Carnaby site and the beaches/town centre would entail a ride of 10-15 minutes. There are doubts as a consequence that a P&R operating from Carnaby would be effective in capturing a significant amount of inbound trips on all three of the main routes entering Bridlington.

A site closer to the town centre (such as at Strawberry Fields) would be better located and could improve the financial viability of P&R due both to the reduced journey time into the centre and therefore greater appeal to users, and to the reduction in the number of buses required to operate a frequent service.

More detailed work is required to assess alternative sites, and an argument for a *seasonal* service made that is acceptable in the context of DfT appraisal processes for the LTP.

Our view is that this kind of scheme could generate very substantial local support – and could also be popular with seasonal visitors (provided the services are frequent and the buses designed to accommodate families travelling with their beach paraphernalia).

Cost = @ £2 million, but cheaper if the land is Council-owned.

iii) Town Centre Relief Road. The aim of the scheme (for which the alignment is not yet specified) is to divert to the north and south of the town centre traffic that is not destined for it in order to release road capacity for town centre trips; a concomitant of the scheme is relating car parking provision to routes into the town centre to deter drivers from circulating around the town centre to find parking, increasing pressure on town centre road capacity.

There is considerable merit in the concept in terms of the potential gains in effectiveness and efficiency – although further work is needed to identify an alignment, assess costs (and what properties would need to be acquired to enable the route), and then to establish the prospective benefits in reduced congestion and balance these against capital costs (and possible problems with securing needed political and public support).

Cost = @ £2.5 million, including land acquisition

iv) Town Centre to Rest of Town – This set of packages aims to improve the linkages between the town centre and the outskirts of town. The key aim is to provide better integration and reduce spending leakage in the town by improving public better access to the town centre and encouraging longer dwell time by better providing better public transport links, improved cycling links and improved car parking arrangements. Visitors to the town would also be able to access the Old Town area more easily.

Two principal corridors have been identified based on analyses of accident records.

- Bessingby Road/ Hilderthorpe Road Corridor – involving improvements to public transport provision, bus stops waiting facilities, provision of information etc, together with minor junction improvements to improve their operation and interaction, at the Hilderthorpe Rd/ Station Road Junction (traffic signalised) and Hilderthorpe Road/ Kingsgate (roundabout). These junctions currently act as bottlenecks on the network. Tourist based traffic would be signed in on this route resulting in less pressure on Quay Road which would have a more local function in the town road hierarchy.

- Quay Road/ St John Street Corridor – involving improvements to public transport provision, bus stops waiting facilities, provision of information etc., plus measures to remove some of clutter caused by on street car parking arrangements by rationalisation of parking control measures. Improved interaction between railway level crossing on Quay Road and adjacent traffic signalised junctions to improve the flow of traffic. Improved provision for cyclists and pedestrians.

Cost = @ £0.25-1 million

v) **Improved Car Park Signing**. Poor car park signing and excessive searching for car parking spaces are a key cause of traffic congestion in the town centre area – particularly during the 'seasonal surge'. The use of VMS (variable message signing) is proposed on the approaches to the town, as well as extensive upgrading of the signing in the town centre. There is currently a lot of outdated and sometimes contradictory traffic signing in the town; wholesale rationalisation is essential. The Council has proposals for improved directional signing, but these have been held up the procurement process. Obviously any major network changes will have an impact on new signing.

Cost = @ £0.25-0.5 million

vi) **Provision of multi-storey car park** to provide a more central location for additional car parking as well as a safe and secure environment for users. Local people and businesses widely consider the car parking provision in the town centre to be insufficient. More detailed work is needed to establish whether this is the case – although the perception that it is clearly impacts adversely on residents' willingness to use the town centre and businesses' willingness both to locate in the town centre and use it to procure services. It is also the case that the marina and the proposed town centre redevelopment will both generate parking requirements. We are firmly of the view that the Council will need to take a more liberal view of parking provision in the near term as part of the effort to improve the town's market appeal and increase investment. The target markets for much of this investment are not easily converted to public transport use and have alternative spending and investment choices which better meet their service and are more accessible.

Cost = @ £1m – although we believe this provision could be procured as part of the town centre redevelopment.

7.27 We recommend that the following, totalling just £3.5 million (well under the major minor LTP threshold, and producing very significant benefits for the town), be given priority – subject to the outcome of the modelling work – for progression as a major minor scheme in the 2005/6 Local Transport Plan:

- Internal improvements in the town centre: @ £0.5 million;
- Park and ride: @ £2.0 million, with urgent discussions with the bus operators required together with the identification of a site closer to the town centre and better located than Carnaby for the three principal access routes into the town;
- Corridor schemes at Bessingby Road/ Hilderthorpe Road and Quay Road/ St John Street @ £0.75 million;
- Car park directional signing @ £0.25 million.

Business Space

7.28 The priorities are the provision of 10,000 sq ft (900 sqm) of 'grow-on' space at Bessingby and 25,000 sq ft of speculative light industrial space at Carnaby. Both are eligible for ERDF grant and there is provision in the IDP. Further small business space is needed, but in the town centre, and it should be procured, if it proves feasible, as part of the town centre redevelopment

7.29 The business space at Bessingby will need to be provided by the Council; assuming £0.3 million of ERDF grant, the Council and Yorkshire Forward will each need to provide £0.35 million in match funding to cover the estimated £1.0 million cost.

7.30 The speculative space at Carnaby, Drivers Jonas suggest, could be jointly procured with a private development partner, with the partner committing the risk investment and the Council the land plus inducement via the European programme. The Council estimate that a total of £1.8 million in public money could be available, made up of £0.63m in ERDF grant and match fund in equal shares from the Council and Yorkshire Forward. The Council may also need to guarantee an initial rental income as further inducement.

Public Realm and Public Art in the Town Centre

7.31 We recommend (as an urgent project and an ‘early win’) that the Council prepare, with external design assistance to ensure top quality, a public realm strategy for the town centre to achieve the following:

- Substantial improvements in legibility, including signage
- Visual zoning clues to differentiate the retail core from the esplanade and sea front
- A scheme to mask the fun fair and related attractions out of season
- Improvements to public space to create clear and differentiated areas for shoppers and visitors to gather and relax
- Raise the overall visual quality of the public realm
- Design codes for signage and shop fronts, differentiating between the functional parts of the town centre
- Street furniture, hard and soft landscape to differentiate and define the functionality of different parts of the town centre
- Public art to raise the quality and interest of the public realm.

7.32 Once designed, the scheme should be costed and a plan prepared for its incremental implementation.

7.33 We recommend that the Council re-visit the IDP and reallocate funds away from the Spa. Up to £2.1 million would appear to be ‘available’ and we recommend using this money instead to finance at least the first phase of the much-needed public realm improvements. The payback in improved competitiveness for the town would be very substantial in the longer run – showing the investment market an early win and indicating the public sector’s commitment to the delivery of the Regeneration Strategy.

7.34 We also recommend that the Council initiate a S106 scheme as part of the work for the Local Development Framework for Bridlington that obliges all residential developers in the town to contribute a sum to help finance the public realm for the town centre, including its on-going maintenance. The rationale is that residents of the town (the purchasers of the new housing) should be using Bridlington as their town centre, and will therefore be increasing pressure on the public realm and other common infrastructure. The LDF for Bridlington needs to propose this, and the detail will need to be set out in both the LDF and the Area Action Plan. The method of assessing the contribution required will need to be fair and transparent. Other sources of funding may be available from the ODPM’s new campaign for better public realm under its sustainable communities strategy.

7.35 We suggest that consideration be given to holding a European design competition for the public realm scheme – making the budget for the capital works clear and setting out clearly the criteria that will be exercised in judging the scheme (e.g., the scheme has to be distinctive to Bridlington, the hard landscape needs to be low maintenance, planting suitable to the local environment, capital costs within budget and so on). Local people could then be invited to comment upon – even to choose – the winning scheme and the Council can be confident that the highest design quality will be forthcoming. The publicity could be very helpful.

7.36 The scheme needs also to anticipate the town centre redevelopment, the creation of the marina and the landscape setting that will be required for the Spa.

Royal Spa

7.37 As set out above, we recommended that the Council progress the option proposed by Pan-Leisure – expenditure of £4.1 million to create the changes listed in paragraph 6.17 above. However, the subsequent development of the 'concept' scheme uncovered fundamental issues regarding the technical feasibility of the existing building to deliver what was required to meet current legislation and the aspirations of the project within it's physical limitations. The design now incorporates elements of extension and reconstruction to achieve a significantly higher level and more flexible facility than originally identified as the 'minimum' acceptable course of action. The Spa will be a genuinely multipurpose conference, events and entertainment facility capable of attracting and servicing the widest range of conference events and extending its markets whilst retaining established trade.

7.38 We accept Pan Leisure's conclusion that any significant improvement in the Spa's competitiveness will depend additionally on improvements in the appeal of the town (in particular the accommodation offer) – but we do not believe that the £4.1 million plus investment in the Spa will be sufficient to trigger such investment, including in the needed hotel(s).

7.39 The enhanced level of redevelopment of the Spa actually being implemented and due to open in 2008 greatly exceeds the 'minimum' scheme recommended by Pan Leisure/Drivers Jonas and it is expected to help build confidence and interest needed to trigger additional investment and development in the town, which in turn will benefit the Spa.

'Soft' Measures to Support the Capital Projects

7.40 In line, broadly, with the IDP we recommend that consideration be given to a programme of 'soft' interventions to support the capital projects, as follows:

- A branding campaign once the marina construction is confirmed and the assembly of the town centre development site is committed and ready for marketing to the development industry. The Council will need to take expert advice on this programme – but it will be essential. Local businesses need to be fully consulted and advised on the implications for their own marketing campaigns. The branding needs to be broadly based – and aimed at improving the profile of Bridlington as a place to live, run a business from and visit. It should not be dominated by tourism activity
- Some reorientation and updating now of the existing tourism marketing material, plus some branding for the shellfish industry. Again professional advice is merited – most particularly on how best to diversify the target markets on current products, and to promote the fishing industry.
- A new and innovative tourism information scheme targeted on the general public as well as businesses, and designed to improve market information generally: what Bridlington aims to achieve in the market (e.g., proposing specific targets like increasing the number of overseas visitors or visitor numbers from the south east, increasing the spending in fashion shops, increasing attendance at events, increasing over night stays etc.), how Bridlington compares to other places

competing in similar markets, including information on competitors and why they are doing well, what lessons can be learned etc., and to provide feedback loops on local performance. Ireland mounted – to evidently great effect – such a campaign and could provide best practice advice on emulating the scheme for Bridlington; and

- A series of promotional schemes to improve, and broaden the market for, the food and drink offer in the town centre. We suggest that the Chamber and the Rotary Club be approached to support a restaurant competition in two or three categories – and to aim to get the support in the first instance of the Yorkshire Post as well as the local press (e.g., a cook-off contest for best fish & chips; best restaurant fish meal using local produce; best hotel restaurant).
- A study into the feasibility of creating a surfing attraction through the creation of an artificial reef.

Leisure World

7.41 We do not see the improvement of Leisure World as an essential part of the Regeneration Strategy – but consider instead that its maintenance is critical as a local amenity.

7.42 Thus, our advice is to concentrate the public sector's resources (over and above matching the ERDF grant that can be drawn down for the Spa) on securing the marina, the related redevelopment in the town centre, and the relatively minor improvements to the highways needed to upgrade the accessibility of the town and reduce the impact of the 'seasonal surge.'

Economic Impact of the Regeneration Strategy

7.43 We estimate that the overall value of the Regeneration Strategy to Bridlington's economy, measured by the estimated change in employment following from the delivery of the Strategy, significantly exceeds the policy-off base case of 2,320 jobs by 2016.

7.44 The consequence of the net job creation would be to achieve the most important aim of the Regeneration Strategy – to bring the town's labour market broadly into balance even with a higher economic activity rate and halving unemployment to nearer 3%, an average that is in line with the better performing seaside towns.

7.45 The best – and a complete – measure of impact is the effect on jobs. All other effects are simply the paths to the job creation effects.

Early Wins for the Bridlington Regeneration Partnership

7.46 An important aspect both of the Strategy and its delivery will be the Partnership's ability to gain the confidence of its markets. The development industry and prospective occupiers and investors, whether businesses or householders or simply people with money to spend in shops, will want to see that progress is being made. Progress will encourage risk investment. Therefore the partners need early wins.

7.47 The two major elements of the Regeneration Strategy we propose are big, complicated projects that will need to be supported by land assembly exercises and orders (for the marina and the town centre redevelopment project). These kinds of project – although essential to making the step changes needed in Bridlington's market position – take time.

7.48 These large projects do not however mean that there is no scope for bringing elements of them forward quickly and progressing other schemes – most particularly, works proposed to improve highways capacity, reduce congestion and increase and improve parking provision, the refurbishment of the Spa, a major public realm strategy for the town centre and the grow-on space at Bessingby.

7.49 Nor does it mean that the partners cannot support ad hoc projects as they come forward. It is essential that the market continue to operate, with the partners doing what they can to promote and support development where it advances, or poses no threat to, achieving the principal aims of the Regeneration Strategy.

7.50 The only issues the partners will have to resolve are: where developer-led proposals conflict with its aims and are so significant as to put the achievement of these aims at risk; and where ad hoc schemes require resources which diminish those available to promote schemes of strategic significance to achieving the aims of the Strategy. The former will tend to be the most contentious. The risks are of two types, each of which will need to be managed and resolved:

- From competing schemes – within the town centre and outside it (e.g., in Driffield) – that risk dissipating demand in markets which are fragile (offices in the town centre) or where demand is finite (retail, leisure), and where the aim must be, for the success of Bridlington's economy as a whole, to develop concentration and critical mass in these markets within the town centre (and therefore why the aim must be to locate this development within the town centre wherever possible).
- The risk that any new development, in order to create its own critical mass and optimise the returns for its investors, will take for itself all the high value "cherries" (e.g., retailing, leisure and residential; but also new cultural or tourist facilities capable of acting as anchors for other development) that the market offers at any one point in time, such that it becomes difficult to attract any significant representation from these uses to other parts of the centre, where the value is also needed to pump-prime a development or to contribute to critical mass.

7.51 The early win schemes we recommend are:

- The public realm scheme (perhaps with an element of public art but depending on the resources available for capital works).
- The road corridor improvements (Hilderthorpe Road/Bessingby Road corridor and the Quay Road/St John's Street corridor).
- The grow-on space at Bessingby.
- The refurbishment of the external appearance and landscape of and around the Spa.

Next Steps

7.52 The urgent next steps are:

- The detailed work to deliver the Bessingby grow-on, Carnaby and Spa schemes.
- The feasibility work on the town centre scheme – with the next steps the physical appraisal and design work to establish capacity and a layout that optimises the site and the linkages with the retail core and harbour, coupled with the more detailed marketing work to establish the scale and nature of developer interest. Until this is done, it is impossible to get a feel for the balance of costs and development returns. Once this is complete, steps can be taken to assemble the land and seek a development partner
- The design and costing of the public realm scheme, plus a strategy for its delivery over time – most particularly the first phase. We suggest this work be commissioned externally and be carried out alongside the urban design work needed on the town centre redevelopment scheme.
- The completion of the detailed work on the transport elements of the Strategy, plus full investigation of the park and ride and relief road scheme, including costings and discussions with prospective

bus operators; the latter again should be done in conjunction with the urban design work on the town centre strategy.

- Importing the Regeneration Strategy within the wider Masterplan for the central area of Bridlington that will be possible once the town centre redevelopment and marina feasibility work are complete.

- The work on the Local Development Framework for Bridlington and the Area Action Plan for the town centre – that can be done in tandem with the feasibility work on the town centre.

  - Reconsidering the IDP, possibly reallocating £2.1 million away from the Spa in favour of the public realm scheme.

The Transport & Works Order

7.53 The Council is now experienced in promoting a Transport & Works Order – and this experience will stand it in good stead in dealing with the land assembly for the town centre development. The only counsel we can provide is to ensure, in advance of making the orders for the revised marina proposal, is to ensure that the benefits are deliverable and substantial exceed the costs of the scheme and that the Harbour Commissioners, and any other major land interest that is affected, is fully supportive.

7.54 The decision about the quantity of the made land and its purposes will be critical – and should be made in conjunction with the decision on the town centre redevelopment site.

7.55 The stage 2 engineering work on the marina can proceed while the further work on the town centre site is being carried out.

Land Assembly for the Town Centre Redevelopment Scheme

7.56 The site for the town centre redevelopment scheme will need to be assembled. Although we advocate the creation of a land owners partnership with the Lord FoesFoes and the Harbour Commissioners, we also recommend that the Council resolve in principle to pursue a CPO should it prove necessary.

7.57 The aim of a landowning partnership is to assemble, in advance of securing a developer for the scheme, (as much as possible of) the target site (or a large part of it) at nil cash outlay to the public sector. The general principles of a partnership approach are:

- Each landowner agrees to contribute his land-owning to an initial equity pot. Each owner’s land is valued to a formula agreed by all the partners (existing use value or open market value); the value of the total equity pot is the sum of the individual values, all of which are known and agreed by all the partners. ERYC would contribute whatever land it owns, plus whatever additional land it pays to acquire (both by negotiation and by compulsion), *plus* whatever else ERYC propose to contribute (e.g., site prep). The landowner’s incentive is that he is likely to do better by participating in the partnership than he would by selling or developing independently – either or both because he could not as an individual landowner get a more valuable planning consent or because he stands to get a measure of betterment that would otherwise not be available. If the landowner is not motivated by commercial gain (as is evidently the case with the Lord Foefoes), then clearly the advantages of participation need to be in terms that produce the requisite rewards – e.g., an enduring legacy for the regeneration of Bridlington.

- Each land owner agrees to participate as a partner in the development project, meaning that each agrees: a) not to take any action in respect of his land for the duration of the partnership agreement; and b) to dispose of his land to a developer selected by the partnership and on terms offered by the partnership.

- The landowners then have one or other of the following options:

  – To sell their land at a price which is pro-rata to their share of the equity that is sold to the developer and (which means a pro rata share of what the developer is prepared to offer), and then leave the partnership.

  – Where the developer offers less than the value of the equity pot, it is still likely to be higher than what the landowner could have achieved as an individual where there are obstacles of some kind in the way of the landowner operating independently. Where such obstacles do not exist (or they are not very robust), ERYC could, as part of the agreement with the landowners, offer to 'purchase' any gap between what the market actually offers and what has been anticipated as the open market value (OMV) or existing use value (EUV) value of the land (e.g., in order to encourage the partners to work together, or once a develop to relinquish his share, for example).

  – The major advantage to ERYC is that it will not have had to expend as much money on acquiring the landowner's interest as it would have had to in the absence of the partnership arrangement. And the more land that is so tied up, the lower ERYC's exposure at the front end of the development period – when it will also wish to invest in site preparation. But, as we point out below, this requires a rock solid partnership – and usually also that each partner's land is also within the red line of the CPO (to protect ERYC's position).

  – To sell their land at a price which is pro rata to their share of the equity sold to the developer, but to forego payment to a later date in order to achieve both this value *plus* a share of the value that is created (again pro-rata to the equity contribution, but with the value of the equity re-calculated to take account of the risk capital invested by the purchasing developer and the rate of return the developer will require against this investment as well as the skill and time he has invested). In this case, the participating landowners are effectively joint venture partners.

7.58 The usual arrangement in such partnerships is for the public sector to stay in longest – granting the priority return to the developer and only taking a land receipt after the other partners have achieved their initial EUV or OMV return, and only taking an overage share after the other landowning partners have had their cut.

7.59 The advantages of a partnership approach are as set out below, but need to be weighed against the disadvantages.

Advantages of a Land-owning Partnership

- ERYC's initial cash outlay can be much reduced – even deferred entirely in respect of the partners' land.
- Political – especially if there are one or two (or even more) major landowners in an area whose interests it could be awkward to acquire compulsorily.
- The willingness of the landowners to form a partnership can strengthen a CPO case for the remainder, on the grounds that the landowners' willingness to participate strengthens the evidence of the scheme's deliverability.

Disadvantages of a Land-owning Partnership

- Time – it can take a long time to set up such a partnership, and the partnership may have to endure for a long time too (at least until there is a developer in tow prepared to acquire the partnership's interests).
- Complexity – dealing with more than one interest is always more complex, and complexity is a deterrent to the development market unless the sell-on is as a single ownership with few strings.

- Uncertainty – the partnership has to be legally binding on the partners or it is a complete waste of time.
- Risk – unless *all* the land required, including the land owned by all the partners, is within the CPO, there remains a risk that one or more of the partners will renege on its agreement to sell on the terms specified in the partnership agreement (which is why the partnership agreement needs to be must be legally binding).

7.60 Partnerships work best where there are relatively few land owners and where there are robust obstacles to any one of the partners' ability to secure a valuable planning consent or develop independently of the rest (e.g., where planning policy requires comprehensive redevelopment). In this case, landowners will recognise that they are more likely to be able to realise the existing use (or even open market) value for their property if they join the partnership than if they tried to sell independently. Where their land would otherwise be acquired compulsorily, they may also have an opportunity, if they elect to participate in a landowners' partnership, to share in any overage that the development scheme might create. Thus a partnership can offer the prospect of making them better off than if they just took compensation under a CPO. Although to so benefit, a participating landowner would need to forego at least some of his land receipt, stay in the equity pool and share risk.

7.61 Clearly, however, the opportunity for overage (as an inducement to the creation of a land-assembly partnership) is minimal or non-existent where a development scheme cannot create value over and above the developer's required rate of return and the needed compensation to the public sector (whose costs would need to be re-paid before overage goes to a third party).

7.62 The onus on ERYC in respect of any such partnerships is to ensure that the partnership is fully supported. In practical terms, this would require ERYC to pledge not to take any actions that would pose a risk of frustrating the aims of the land-owning partnership (e.g., by agreeing not to sell land that would facilitate a competing scheme, not to promote a competing scheme and so on).

7.63 At present, there is only a limited amount of land in the major project areas that is in the freehold ownership of ERYC – although there the Council could conceivably swap land in other parts of Bridlington (also suitable for development) for land owned by others in the candidate location for the town centre scheme.

7.64 There are substantial landowners in the designated area of search for the town centre scheme who might be candidates for this type of partnership or at least who might be approached with the possibility (with the spectre of CPO, they may be more willing to talk, and there may be in any case be advantages to them as explained above).

Forward Acquisition

7.65 ERYC needs additionally to consider – once the Council has resolved to assemble a specific site – an active programme of forward acquisition.

7.66 Acquisition by negotiation is clearly to be preferred to compulsion – but not where the inducement needed is out of proportion to the gain! Compulsory Purchase settlements are fair, although until an order is confirmed, the CPO route carries with it uncertainty. This uncertainty should be avoided if it can be achieved at the price of a reasonable premium.

7.67 ERYC will wish additionally to consider acquiring buildings or sites outwith the candidate comprehensive development area that could be candidates for accommodating important relocations.

Compulsory Acquisition

7.68 Compulsory purchase of the town centre redevelopment site (and possibly part of the land needed for the marina) will be necessary if all the land suitable and required for the scheme cannot be acquired through voluntary agreement. Depending on the timing and robustness of any landowning partnership, it will almost certainly be wise to include partners' land within a CPO boundary as well (and it could improve the robustness of the partnership if the land is indeed within the line). Side agreements can be reached in which ERYC promises not to acquire if the landowning partner fulfils its agreement to participate in the development.

7.69 Although compulsory purchase appears threatening, it is a fair system with clear and transparent rules for settling acquisition costs and paying disturbance and compensation. CPO also makes it possible to grant the eventual third party purchaser clean and unencumbered title to the land (which will improve its value). Compulsory purchase is only allowable under strict circumstances in the public interest. We consider that the case for acquiring the land to permit the town centre scheme easily meets the test of being compellingly in the public interest: the town centre scheme offers the only realistic prospect of creating the substantial number of additional jobs needed, and urgently, for Bridlington's regeneration and prevents individual landowners from holding the project to ransom.

7.70 The making of an order also demonstrates to the market the public sector's full backing for the scheme. This backing is critical to the private sector's confidence.

7.71 The regulations for compulsory purchase under the new Planning and Compulsory Purchase Act are anticipated in October 2004 – and therefore it is likely that ERYC will, if CPO proves necessary, exercise their powers under the new act.

7.72 Circular 02/03, which guides the exercise of CPOs under the existing legislation has, however, only recently been published. A consultation draft of a replacement circular (no number) for guiding CPOs under the new act was published for consultation in May. But because it is in draft and proposes little change to Circular 02/03 (it mainly aligns the CPO powers of local authorities, the RDAs and EP), we mainly set out here the provisions of Circular 02/03.

7.73 Circular 02/03, we emphasise, is a considerable relaxation on Circular 14/94 which it replaced – as we show below. But like its predecessor, it states that regardless of the powers exercised, a compulsory purchase order should only be made where there is a compelling case in the public interest such that the acquiring authority is justified in interfering with the human rights of those affected. The new draft circular re-states this, and refers to the provisions of Article 1 of the First protocol to the European Convention on Human Rights (and in the case of a dwelling, Article 8 of the Convention). The more comprehensive the case – and we believe this obtains in Bridlington if the marina and town centre land assembly are considered as a single strategy – the stronger it is likely to be.

7.74 CPO, however, is intended as a 'last resort' to be used when attempts to acquire by agreement fail. The new draft circular emphasises the same, but as does Circular 02/03, also acknowledges that it is often sensible to prepare an order at the same time that negotiations are taking place – both because of the time required to prepare an order and because the intention to make an order demonstrates the seriousness of the acquiring authority's intentions.

7.75 Circular 02/03, in setting the tests for demonstrating that the order is compellingly in the public interest – that is, that the public benefit will outweigh the private loss – states that the Secretary of State will need to be satisfied that:

- There is a reasonable prospect that the scheme (for which the land is required) will be delivered, and therefore that:

- If there is not a planning permission for the scheme, there is at least no obstacle to planning consent. This means that, in the absence of a planning permission, it is necessary to demonstrate that the proposed scheme conforms to the Development Plan (irrespective of which authority exercises the powers), and if not, that there are other material considerations to show that there are no obvious reasons why a permission should be withheld. Supplementary Planning Guidance (SPG) that has been fully consulted upon and adopted is such a material consideration (as is the authority's Community Strategy). The draft circular refers to the PPS12 statement on SPG – although at the time of drafting this report PPS12 was still in draft.
- The acquiring authority has the resources necessary to acquire the land *and* implement the scheme for which the land is required (and if there are shortfalls, to demonstrate how the shortfalls will be met). The timing of the availability of the resources is also important – to ensure that the acquiring authority can cope with any problems of blight that may arise.
- There are no other impediments to implementation – including, for example, the programming of infrastructure works, the need for licences and so on.

- The subject land is 'required immediately' in order to secure the purpose for which it is acquired. Immediately means that the notice to treat (intention to purchase) must be served within three years of an order being confirmed by the SoS, which then remains effective for another three years (i.e, there can be six years between the confirmation of an order and actual acquisition of the order property). Circular 02/03 states, however, that only very exceptionally, and then only if fully justified, could there be instances where it would be reasonable to acquire land where there was little prospect of implementing the scheme for a number of years. The draft circular states that there is no presumption that, in demonstrating that a case for acquisition is compellingly in the public interest, that the acquiring authority must show that the land is needed immediately. The draft circular stresses however that the acquiring authority needs to 'have a clear idea' of how it intends to use the land and show that the resources are available to deliver the proposed development.

7.76 The SoS is not to pre-determine what amounts to full justification for an order, but is to treat each case on its merits. The statement of reasons that accompanies the making of an order is to contain the full case for the order, including information in relation to the tests set out above.

7.77 Objectors too are to be required to submit statements on their grounds for objection (statement of case) – so that the SoS can determine in advance whether there are grounds for these to be heard at inquiry.

7.78 Both Circular 02/03 and the draft replacement circular stress that the Secretary of State is to be given early notice should any application for an order be associated with any other order or appeal to which it relates involving a different Minister so that the SoS can determine the appropriateness of arranging a joint or concurrent inquiries. The acquiring authority needs to ensure that any statutory procedures for which it is responsible are carried out at the right time to enable related applications to be considered in step.

Local Authority Powers under the TCPA 1990 S226(a) and S226(b)[40]

7.79 Local authorities, with the authority of the Secretary of State, are given powers of compulsory acquisition by the Town and Country Planning Act 1990 at Section 226 for land which:

- 226(1)(a): "is suitable for and required in order to secure the carrying out of development, redevelopment or improvement;" or
- 226(1)(b): "is required for a purpose which it is necessary to achieve in the interests of the proper planning of an area in which the land is situated."

[40] Local Authorities also have powers of compulsory acquisition under Section 17 of the Housing Act 1985 – but these powers are not relevant in this case.

7.80 The two purposes (a) and (b) are intended as alternatives, with the powers under (a) directed at land which is needed for development and the provisions under (b) for land that is not required for development, redevelopment or improvement but for other purposes in the interests of proper planning.

7.81 In considering whether land is "suitable" for acquisition, S226(2) of the Act states that the SoS shall have regard to:

(a) the provisions of the development plan;

(b) whether any permission on the land is in force; and

(c) to any other consideration material to determining an application for planning permission.

7.82 In determining whether the land is "required", the SoS has regard to whether the development, redevelopment or improvement will actually be carried out.

7.83 The Circular requires local authorities to specify whether they are using the provisions of S226(1)(a) or S226(1)(b) – with the former relevant to acquisition to promote a specific development scheme or improvement, and the latter relevant to broader powers in the interests of proper planning (where there is no scheme). The Circular gives no more guidance than this – but simply states that the power is potentially broad and useful (which probably means it has not been tested yet in the courts). The draft circular makes a similar point.

7.84 S226(3) allows a local planning authority additionally to:

- acquire any adjoining land which is required to execute works to facilitate the development or use of the primary land; and
- acquire land to give in exchange for any of the primary land "which forms part of a common or open space or fuel or field garden allotment."

7.85 Section 226(4) allows a local authority to acquire land for a third party who will be delivering the scheme.

7.86 If an authority is exercising its powers under more than one of these provisions, this must be set out in the same order the relevant subsections.

7.87 In respect of the conformity with the development plan, local authorities are not necessarily bound by the provisions of the plan provided they can show that material considerations outweigh its provisions. These can include national or regional policies, for example, on regeneration or housing that have been brought forward since the plan was adopted. The draft circular provides further guidance on this, and we set this out below in paragraph 7.44-48.

7.88 Where this is the case, the SoS will expect these to have been worked up in Supplementary Planning Guidance. ERYC are in the process of beginning their local plan preparation under the new Act (see 7.44-48) – and it is essential therefore that as much progress is made on the plan for Bridlington as possible in advance of making any CPO (although, helpfully, the adopted local plan does not preclude the sort of town centre redevelopment scheme proposed).

7.89 In respect of the need for planning permission in advance of making an order, the Circular states:

- The main requirement is to show that the delivery of the scheme would not be blocked by planning problems. The easiest way to show this is an extant permission – but the Circular recognises that it will 'not always make sense' to wait for permission before making an order. However, it is not advisable for a planning authority that is exercising its power under the planning act to apply for in order in absence of planning consent..

- But, the Circular also states that the SoS will 'be willing to consider an order in advance of or, more desirably, in parallel with seeking planning permission.' But that 'This will, however, mean that the authority making the order will have to accept the possibility that the order could be rejected while the planning permission was granted.'
- That there may circumstances (e.g., where the development plan is out of date in respect of national or regional policy) where the only planning policy supporting an order will be supplementary planning guidance. In this case, the SoS will need to be satisfied that all those who might have objected to the SPG have had an opportunity to do so and that the objections have been taken into account in the decision to adopt the SPG.

7.90 While Circular 02/03 relaxes the absolute requirement for planning permission, it does not entirely remove it. In the absence of a permission, the preference is for the order to be submitted at the same time that a planning application is made. And failing this, acquiring authorities will have to accept the risk that the order will be rejected. The risk of this is clearly reduced where SPG anticipates the development and that any objections to the SPG have been taken into account before the Council adopted the SPG. (Readers who are not familiar with planning legislation will need to be aware that objections need to be lawful – have valid grounds – in planning terms. Simply not liking something is not adequate grounds, most particularly where the proposals conform to the development plan or regional or national policy put forward since the plan was adopted).

7.91 Uniquely under the Planning Act, the SoS can disregard objections which are effectively objections to the provisions of the development plan. This can be extremely useful where the proposed use of the land conforms. Where the proposed development does not conform, but is relying instead on provisions in SPG, whether or not this is a useful provision is less straightforward. PPG1 requires supplementary planning guidance to be just that – supplementary and not new policy. However, the materiality of SPG also rests on the extent to which it has been consulted upon prior to being adopted.

7.92 In respect of the need to demonstrate that the resources are in place to deliver the scheme, the Circular requires the acquiring authority to demonstrate that the scheme is viable financially or that the resources are in place or committed by the relevant third parties. If an acquiring authority chooses to submit full financial details as part of the case for the order, the SoS is entitled to take this evidence into account (which could compromise the case if the finances depend on grant aid which is strictly time limited).

Yorkshire Forward

7.93 Yorkshire Forward, as a regional development agency, also has powers of compulsory purchase, and can exercise these with the Secretary of State's authority under Section 20(1) of the 1998 RDA Act. Unlike a local planning authority, Yorkshire Forward is not bound by the provisions of the TCPA. Instead, the tests for a regional development agency are that the order must relate to one of the agency's five purposes [of which the most relevant are those relating to regeneration and the development of land to this end).[41]

7.94 However, YF have only very recently attempted to use their powers (in Sheffield) and are encountering problems. While Bridlington – given their support for the marina – might meet the test of regional

[41] These are, briefly: to further the economic development and regeneration of the area; to promote business efficiency, investment and competitiveness in the area; to promote employment in the area; to enhance the development and application of skills relevant to employment in the area; and to contribute to the achievement of sustainable development in the UK where it is relevant to its area to do so.

significance, we still feel it unlikely that YF will have the appetite to pursue an order for the town centre scheme.

Changes in the Compulsory Purchase Legislation – the Draft Circular

7.95 The Planning and Compulsory Purchase Act replaces TCPA 1990 Section 226[a] where it states that land must be suitable and required for development with: 'if the authority think that the acquisition will facilitate the carrying of development, re-development or improvement on or in relation to the land.' And adds that an authority must not exercise the power unless they think the development, redevelopment or improvement will 'contribute to the achievement' of the 'promotion of the economic, social or environmental well-being of their area' either, or all of, economically, socially and/or environmentally. Subsection [2] – which says that a proposed development must have regard for the development plan or to any other considerations relevant to a planning consent – is omitted.

7.96 The government introduced the well-being power to relax the traditionally cautious approach to planning – and to encourage an innovative approach and especially a spatial planning approach – to delivering the objectives of government's sustainable communities strategy, bringing together and integrating policies for the development and use of land with other policies, including regeneration and improving local environmental quality.

7.97 The draft circular states that the planning framework providing the justification for a CPO should be as detailed as possible, and founded on an appropriate evidence base. Where the justification is linked to proposals in a development plan document which has been through the consultation process, but has not yet been examined or is awaiting an inspector's recommendations, this will be given due weight. The draft circular states that where the development plan is out of date and local development documents are still in preparation, that 'it may well be appropriate to take account of more detailed proposals being prepared on a non-statutory basis with the intention that they will be incorporated in the local development framework at the appropriate time.' Such proposals, the draft circular states, might be in the form of a masterplan or other detailed delivery mechanism prepared by the authority.

7.98 Critically, in respect of the latter (and relevant to Bridlington), the draft circular states that where such proposals provide the justification for the order, that there should be clear evidence that all those who might have objections to the underlying proposals have had an opportunity to have the objections taken into account by the proposing authority.

7.99 The draft circular states that the SoS in deciding whether to confirm an order made under S226(1)(a) will be made on its own merits, but that the matters the SoS can be expected to consider include:

i) whether the purpose for which the land is required fits with the adopted planning framework, or where this is not up to date, with the core strategy and any relevant Area Action Plans in the process of preparation in full consultation wit the community;

ii) the extent to which the the proposed purpose will contribute to the promotion or improvement of the economic, social or environmental well being of the area;

iii) the potential financial viability of the scheme for which the land is required. The draft circular states that a 'general indication of funding intentions and of any commitments from third parties' will generally suffice – but also stresses that the greater the certainty of funding, the more compelling the case for the order; and

iv) whether the purpose for which the authority is proposing to acquire the land could be achieved by any other means.

The Duration of a Confirmed Order

7.100 The rules require that notice to treat be served within three years of the confirmation of an order, where upon there is a further three years before land must actually be acquired. Save for the provision for blight, the rule therefore is that the order lasts for six years.

Decisions on Land to Include in an Order and Road Closure Orders

7.101 The decision on the "red line" for any individual order needs to take account of:

- The consequences for ERYC's ability to achieve the proposed comprehensive development if the land is excluded. If the scheme could proceed without the land parcel, then it should be excluded. If the scheme would be materially harmed or disadvantaged if the land parcel is excluded, then the parcel should be included.
- The security of any partnership deal that covers land that, without the partnership, would otherwise be within the red line. Many a deal has been frustrated (delayed, made more expensive) because a partner's land has been excluded, and the partner later balks at yielding up the land.
- Whether or not the land is in the control of a statutory undertaker, and whether if this is the case, the land is operational or might become operational. While it is not unknown to CPO land, even operational land, owned by a statutory undertaker, it adds significantly to the complexity of an order. Nonetheless, it should not be avoided solely for this reason if there is otherwise a compelling case for including the land.

7.102 As a general principle, it is better to include land that is needed; otherwise, subsequent to the confirmation of the order, there is a major risk of delays, rising costs, further uncertainties and so on in getting hold of the land.

7.103 The work on the CPOs needs to take into account any road closure orders that may also be needed, and these orders should be made simultaneously with the CPO.

Preparation for CPO

7.104 Although we have put together the 'compelling case in the public interest' for the town centre scheme in principle, the scheme itself needs to be worked up and its financially deliverability and planning acceptability demonstrated. In respect of the need to demonstrate that the resources are in place to deliver the scheme, the Circular requires the acquiring authority to demonstrate that the scheme is viable financially or that the resources are in place or committed by the relevant third parties. If an acquiring authority chooses to submit full financial details as part of the case for the order, the SoS is entitled to take this evidence into account (which could compromise the case if the finances depend on grant aid which is strictly time limited).

7.105 CPOs must be made with full regard for the regulations – and ERYC will need expert legal and development surveyor, as well as planning, assistance. ERYC will be gaining experience of CPOs – either through the Planning Act or the Housing Act) – through its participation in the Pathfinder project.

7.106 We set out below the next steps in respect of the town centre scheme.

Planning Policy

7.107 The Regeneration Strategy will need to be put on a proper footing in planning policy. The approach we propose here lends itself to development via a Masterplan, incorporated in an Area Action Plan, under the provisions of the new Act. We summarise very briefly the main elements of the new planning policy we propose below – but recommend that this work be developed properly, building on the Regeneration

Strategy recommended here. First we look very briefly at the provisions of the adopted Local Plan insofar as they relate to the principal actions proposed by the Regeneration Strategy.

7.108 The East Yorkshire Borough Wide Local Plan was adopted in June 1997. The provisions for Bridlington are out of date in a number of respects – and are also now out of sync with the emerging Joint Structure Plan. The Local Plan proposes restraint (it defines a strict boundary for Bridlington's built up area), and the JSP designates Bridlington as a principal town and thus a locus for growth in the eastern sub-area (a specific housing allocation for Bridlington, we understand, has yet to be made and the town's boundary may need to be reviewed as a consequence; an urban capacity study is also needed). Both, plans, however and in line with regional and national policy, aim to protect the open countryside and natural landscape of the area and require the development of brownfield land in the first instance.

7.109 The Local Plan promotes the development of employment uses at the Bessingby and Carnaby estates – and also promotes a very large site at Wilsthorpe, some distance to the south of Bridlington, for major tourism development (including hotels).

7.110 The employment designations at Bessingby and Carnaby are contrary to the emerging JSP insofar as pure office development is not subject to a sequential test (in the first instance in favour of the main urban area). We would suggest that revised policy introduce a sequential test within the sub-area for pure offices serving a local market in favour of Bridlington town centre within the sub-area.

7.111 We would argue that the Wilsthorpe proposal is also contrary to, in addition to the emerging JSP, regional and national policy which supports a sequential approach in favour of town centres for retail and leisure use, including hotels. Development at Wilsthorpe as proposed in the Local Plan would pose a serious risk to the regeneration of the town centre, displacing development and development and spending that needs to be captured within the town centre to enable it to function competitively for the benefit of the wider economy and the quality of life offered by Bridlington to its residents. Again, revised policy should re-visit policy for Wilsthorpe.

7.112 Local Plan policy promotes hotel development anywhere in Bridlington provided it is (inter alia) compatible with the scale and character of surrounding development and will not adversely affect environmental amenity. Again, revisions to policy are required, with hotel development directed in the first instance to the town centre, then to the Old Town and to other sites only after it has been demonstrated that the proposal cannot be accommodated in either and will not harm either.

7.113 Local Plan policy aims to protect Bridlington town centre's position in the town centre hierarchy and promotes (further) environmental improvements. The area of search for the town centre scheme is wholly within the designated shopping area, and would not be contrary to the shopping policies of the Local Plan (helpful should CPO be required).

7.114 New policy might also revisit:

- the location of offices, to attempt better integration with the shopping and leisure core
- the location of amusement arcades, with consideration for impact on retail activity and the appeal of the town centre outside the summer season
- the holiday accommodation protection area – which we consider to be out of date in light of the changing nature of the tourism market and the shrinkage of the traditional bed and breakfast sector.

ERYC's Proposed Local Development Scheme and LDF for Bridlington

7.115 ERYC propose a development plan document for Bridlington that incorporates and Area Action Plan – a spatial plan to set the land use planning policies for the delivery of the Regeneration Strategy.

7.116 Without prejudice to a proper piece of work in respect of land use policy for Bridlington, the indications are that the new policy document will need to:

- revisit policy on all out of town sites that are undeveloped but are allocated for tourism, bulky retail and commercial uses to ensure that their future development does not prejudice the proposals in the Regeneration Strategy, most particularly for the town centre where retail, associated leisure, hotel, housing and office uses are sought (and further tourist attractions if these prove feasible);
- review housing allocations, in the effort to support the forecast level of population growth (at the very least);
- instate sequential tests for pure offices and leisure uses (in additional to retail)
- clarify the relationship between the town centre and Old Town
- designate the town centre redevelopment site and specify the new retail circuit (primary frontage) and indicate development quanta and relationships / linkages to the established shopping core
- indicate a preferred hotel site well-related to the proposed marina
- designate the new landscape framework
- designate the parking strategy and any amendments to highways circulation
- designate the marina site and relationship to the harbour and town centre
- protect the link between the Spa and the town centre
- require linkages from the town centre along the north flank of the harbour into the marina area.

7.117 We also suggest that ERYC consider the creation of a S106 policy to create a fund for paying for the capital and ongoing maintenance costs of the public realm scheme. The S106 would be an obligation on all town centre development and on all residential and caravan park development anywhere in Bridlington (with the out of town centre S106 levied per unit of housing). The planning rationale is that the residents of new housing in Bridlington should use the town centre for their shopping and leisure needs and therefore will place further pressure on its fabric. We are progressing the same approach in Swindon and in Hull.

7.118 ERYC are fully aware of the need to instigate the formal consultation process on a draft development document and Area Action Plan as soon as possible (following whatever procedure for public consultation set out in their Statement of Community Involvement). As we set out below, we consider it reasonable to have this document ready for formal consultation – following, say, a public meeting on the planning issues related to the Regeneration Strategy in January 2005, say, by March 2005. Assuming a 12 week deposit period, the Council should be in a position to ‘adopt’ it pending examination by July 2005.

7.119 If this period is too long in light of the marina programme, the Council could, alternatively, consider SPG simply for the town centre scheme on the adopted plan but only insofar as the proposals for the town centre scheme supplement existing policy (which they would – but there would not be the scope to instigate the sequential tests, insist on the highway works – although a multi-storey car park is anticipate, and there could be issues with promoting the housing elements).

LTP

7.120 ERYC will need to make a bid for a major minor provision within the 2005/6 Local Transport Plan to finance the programme of proposed works. The remaining modelling work will need to have been completed, the site identified for the Park and Ride and the heads of terms of an agreement with the bus operators in place so that the service can be tendered as soon as approval is achieved.

7.121 The package for Bridlington will be in competition with others – but we stress that the works are essential to remove identified market failures and set the conditions for both the marina and the town centre development projects.

Development Competition for the Town Centre Scheme

7.122 ERYC will need, in the very near term, to work out the details both of its land assembly strategy for the town centre scheme and its strategy for disposing of the opportunity.

7.123 The following is the broad range of approaches ERYC will wish to consider:

i) A major development competition. The development competition model is most appropriate where ERYC want to explore what the market will actually offer against the criteria it wishes to impose and get some promotional mileage in the market. But to be successful, the model needs to be handled with great skill. The public sector needs to be prepared to respond positively to what the market throws up, and to keep at least some dealing cards up its own sleeve throughout.

The development competition model is broadly as follows:

- ERYC agrees a broad partnership structure with the other principal landowners (e.g., the Lord Foesfoes and the Harbour Commissioners, but there may be others too);
- ERYC gains formal Council approval to pursue a CPO should this prove necessary (and even if not, the willingness to prosecute an order is a critical stick to speeding up the partnership and stiffening its resolve);
- ERYC secures formal agreement to the development competition approach once the mechanism for full land assembly is agreed (i.e., the Council enters a partnership as described above and/ or agrees to promote a CPO, plus make forward acquisitions as opportunities arise);
- ERYC decides the package of initiatives that it will undertake itself to sweeten the appeal of the project (what it will do to reduce the market's risk and improve its returns, whilst also getting what it wants in development mix, design quality and so on);
- The landowning partners agree what other investment each is prepared to contribute alongside or in addition to the equity pool in order to improve the appeal of the offer to the market (this could be something as simple as working out in advance all the wrinkles of the deal to be done with the developer when selected, but could include agreements on land swaps, relocations and so on);
- The partners put together a development brief that sets out the terms on which they are prepared to offer the development opportunity and what criteria bids will be judged on. The terms of engagement include the offer the partners decide upon (what the partners will contribute to improving the market appeal of the project) as well as their financial expectations. The criteria include planning and design issues, as well as financials, track record of the developer, the strength of the developer's team and so on.
- ERYC advertises the opportunity, observing public procurement rules, and then draws up a short list from those expressing interest. Depending on how the competition is conducted, ERYC can ask for a set of preliminary ideas from an interim short list and then full proposals from just two or three. Depending on the rules ERYC has decided to follow, ERYC then negotiates with the final preferred one, two or three, and either goes into detailed negotiations with a final one or two (there are a number of best practice models to follow).
- HOTs are then drawn up and agreed (reflecting the terms set out in the development brief and the basis upon which the developer won the competition); a development agreement follows;

land assembly is completed; and each party fulfils his obligations.

ii) Negotiation with a selected field of three or four developers. Again, ERYC will need to prepare a brief for the opportunity, but be prepared for some flexibility in coming up with a package that matches what the bidding developers are prepared to offer, and that ERYC is prepared to commit to.

iii) Simply selling the opportunities (e.g., separating the housing and retail schemes, or parcelling the scheme into bite size pieces) on the open market – again to a brief – but again with ERYC prepared, at least in principle, to accept what the market offers.

iv) Responding to offers from the market. This can be advantageous, although ERYC will have to be mindful of the risks if it is to succeed in preventing free riders or cherry pickers even where it controls the land.

Identifying and Managing Risk

7.124 ERYC will want, as part of the detailed work on the Regeneration Strategy (its different elements) and programme to prepare a risk management strategy. We summarise here very briefly the main areas of risk and the broad strategies we recommend for minimising and managing risk.

7.125 The biggest risks to delivery, together with the proposals for managing this risk, are as follows:

- Failures in leadership by ERYC or any of its key delivery partners – whether through a lack of conviction, skills or resources to promote the developments (principally the marina and the town centre scheme, but also the park and ride and very good quality public realm), or a preference for 'consensus' (backing a project in Bridlington will inevitably mean not backing others), or a wish to avoid controversy (big projects are rarely without controversy).
- In spite of partnership efforts, there will be occasions during the delivery of the development projects where ERYC's interests will be different to the interests of its partners (we are talking here principally about the Harbour Commissioners and the Lord FoesFoes but also other members of the Bridlington Regeneration Partnership). Minimising this risk will require detailed work during the planning phase of each of the projects to set out very clearly what ERYC will want from each of its partners – what resources, to what timetable, with what flexibility and so on – and to have these formally agreed from the start. ERYC, as projects progress, will have to be sufficiently flexible in its approach to each scheme to be able to respond in turn to changes in its partners' circumstances or priorities and in the case of the Council to political exigencies.
- Failure to use ERYC's land assets to advantage – either missing opportunities for swaps advantageous to progressing the town centre scheme or allowing development elsewhere that risks undermining the town centre (picking cherries, dissipating demand and so on).
- Failure to take advantage of opportunities for forward property acquisitions – allowing others to get hold of possible ransom strips.
- Failure to understand the market's perception of risk and opportunity.
- Failure to secure the needed planning policy platform under the LDD or Area Action Plan.
- Letting the town centre, highways and marina scheme get out of step with each other.

7.126 These risks are minimised through the publication of the Strategy and its formalisation both in statutory planning policy and in the agreements with ERYC's core partners on the marina and town centre scheme in particular (but also with the bus operators for the park and ride).

7.127 A key decision to be made – early on – will be whether to progress the marina order and any CPO needed for the town centre scheme in tandem. The decision can only be made once the further detailed work has been done on both, and once full and open discussions have been held with prospective partners. In both cases an important tactic for managing risk will be the Council's commitment to progressing both the marina order and the CPO. We suggest therefore that the Council, in adopting the Regeneration Strategy as its policy for Bridlington, make an in principle commitment to both.

7.128 ERYC in the detailed delivery plans it will prepare for the marina, town centre scheme and park and ride, will need to consider very carefully how the market will respond to the opportunities and design the offers to maximise its response. Most important will be:

- The phasing of the schemes, ensuring they progress in step so that obstacles that pop up in one do not undermine ERYC's ability to progress the others. All of the schemes should have a 'plan B' ERYC is prepared to live with. .
- The development brief for the town centre scheme (and the made land around the marina). The briefs needs to strike a sensible balance between ERYC's aims and the criteria the market exercise. Every additional expectation by ERYC will be reflected in a reduced offer by the market (although this can be good business; ERYC simply has to pay to get what it wants).
- Certainty that the public sector will deliver its side of the agreement. ERYC will need to have put its own ducks in a row before going to the market - that is, it will need to be certain that it can deliver an assembled site, that there will not be obstacles to planning permission, that there will not be (significant) competition for the same tenant markets by other schemes within the catchment, that the information it has provided about ground conditions, services etc is correct. Anything that is unknown or uncertain increases risk, which means the market will want a higher return and will offer less to ERYC and its partners for the opportunity to develop. Therefore, in preparing the schemes for the market, ERYC's job is to make sure that it knows / has found out the answer to everything that the market will want to question. This, always, will be ERYC's strength in striking deals. Management requires an emphasis always on good research and market intelligence.
- Competition outwith the town centre for the key markets. An issue remains the policy of the Local Plan and the very substantial out of town capacity for competing tourism (and even residential)
- Significant downturns in the market for key uses. Management requires flexible phasing to ensure that the careful differentiation between different opportunities is not lost, putting the whole Strategy at risk.
- ERYC will need its own market intelligence, and its development brief(s) need to build in sufficient flexibility to allow for changes in use mix in line with shifts in the value of these uses and changes in tenant markets.
- Management requires careful timing in bringing the opportunity(ies) m to the market, plus use of the direct development mechanism flexibly in order to maximise the inducements to the private sector to continue to carry risk.

Design Competition for the Public Realm Scheme

7.129 Bridlington needs something sexy, with wow factor, badly. However keen ERYC's own design team is, it would be much better for Bridlington, and a much stronger early win for ERYC (helping to build the market's confidence and to signal the Council's commitment to change in the town) to bring in someone from the outside, and to do so by mounting a public compeitition.

7.130 The design brief should take its cue from the work to be done on the masterplan for the town centre – and specify criteria and a budget and phasing scheme. The criteria need to include the zoning notion for the seaside tat, and to require ideas on how landscape can be used to make the town feel 'open' all year round including on the seafront. The brief should also require the winning proposal to provide a fully costed management plan.

7.131 OJEU procedures need to be followed – and a three stage procedure will be best (EOIs without a full brief; short-listed three or four invited to respond to a full brief; public exhibition of the short-listed submissions followed by selection).

Programme

7.132 We consider that the Council will have prepared and fully consulted upon the new planning policies to support the Regeneration Strategy by end of 2007. It is also possible that the new planning policies will have been tested at inquiry before the end of 2008.

7.133 The town centre redevelopment scheme, with a fair wind on land assembly, should be capable of being put to the development market in the second half of 2008.

7.134 Construction on the town centre redevelopment should be able to begin in 2010, assuming any necessary inquiries are held in 2009.

7.135 The Marina is anticipated to be a public sector project and will be procured once the design is agreed between the partners and the necessary Transport & Works Act and other necessary orders are made and granted.

7.136 Meanwhile the works to the Spa and the public realm in the town centre have begun, with the Spa due to re-open in 2008. The highways works should also be begin by 2010 and completed in 2016.

APPENDIX 1

MARINA IMPACT – DIRECT EFFECTS

Bridlington Marina

Economic impact

The feasibility study indicates that a marina of 500 berths is proposed, and Scott Wilson's market report (undertaken as one of the suite of studies making up the Regeneration Review) suggests that demand could well exceed supply by 2016.

Bridlington harbour currently has 127 moorings, of which 58 are leisure moorings and 69 used by the fishing fleet. Thus the new marina provides capacity for 442 additional leisure berths (assuming that the fishing fleet is separately accommodated in the new marina).

The economic gain from the marina itself will arise from:

- Maintenance and upkeep of boats moored in the marina. This includes repairs and maintenance, lifting out, replacement of equipment and the purchase of new equipment, mooring fees and insurance
- Day spending by owners and crew visiting the marina for boat preparation and day sailing
- Spending by overnight visiting boats.

Additional spending may occur if brokers also base themselves at the new marina.

Maintenance and repair

Average expenditure on boat maintenance and repair is relatively high, but will only be fully captured if the shore facilities include boat repair facilities, on shore storage, specialist engine, sails and electrics facilities, and chandlery. The actual costs will vary with the size, age and type of boat, but annual costs of around £4,500 for a 30ft boat are quoted by boat agents.

Assuming that the marina achieves 80% occupancy then around 400 boats would be based in the marina. Assuming a mix of boat types and sizes, and some leakage of spending away from Bridlington (e.g. specialist purchases and repairs, insurance etc), then annual expenditure of £2,500 per occupied berth appears to be a reasonable estimate. This would generate around £1,000,000 additional expenditure per year.

Day spending by owners and users.

The use of individual boats will also vary greatly depending on the owners, weather and other factors. There is little information available on the average use per year. British Waterways surveys suggest that canal based boats are visited by their owners on around 30 days a year, of which about half are spent cruising and the rest in day visits for maintenance and leisure purposes. Assuming a similar pattern of use with boats berthed in the marina, and taking account of existing leisure berths at Bridlington Harbour, then the 350 additional boats might attract 10,500 visits. Assuming an average of 3 persons per visit, then the additional visitor days would amount to 31,500.

A study of twelve marinas on the south coast carried out by Southampton Institute in 1998 for the Southern Harbourmasters Group found that the average spend per day of visitors to boat berths was £7.87. Taking account of inflation, the equivalent figure in 2003 was £8.76. Thus, boats based in the marina could expect to generate and additional £275,940 of day spending at 2003 values.

Visiting boats

The Scott Wilson report indicates that only around 150 visiting boat nights used Bridlington last year. However, the harbour is not particularly attractive for visiting boats given that it dries out for part of the tide.
The Southern Harbourmasters study found that the twelve marinas in the study attracted an average of nearly 4,000 visitor boat overnights to each marina. The area studied is better developed for cruising and sailing, and it is unlikely that Bridlington would attract such numbers in the short and medium term. However, the provision of an attractive marina in an area with good sailing conditions for the East Coast, coupled with the anticipated increase in cruising and sailing activity could significantly boost overnight visits. It seems reasonable to assume that the number of overnight boats might increase to 1,000 per year.

The Southern Harbourmasters study found an average of 4 crew per overnight boat, with average spending of £24.82 at 2003 value. Thus visiting overnight boats could result in additional expenditure of around £100,000 per year at Bridlington.

Summary

The direct value of the marina to Bridlington based on the assumptions set out above is likely to be around £1,375,000 per year at 2003 values.

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