# Isle of Wight Council

## Town Centres Health Check Study


**Final Report**

**October 2009**

Halcrow

# Contents

# 1 Executive Summary

1.1.1 The most fundamental challenge for the Isle of Wight is sustaining its economy. In the last decade, visitor numbers to the Island have fluctuated considerably which should be of paramount concern for an economy that depends heavily on this sector. While visitor numbers have been on the increase over the last five years, sustaining growth must be a priority.

1.1.2 For the majority of towns in this study, there is a definite link between tourism and the success of the town centre. Retail and leisure uses rely heavily on the tourist pound and this highlights the importance of maintaining and improving its centres.

1.1.3 For this reason, maintaining their attractiveness and accessibility to tourists is important. Simple physical improvements such as good signage, maintaining shop fronts, attractive lighting and street furniture, controlling litter and graffiti, etc. not only contribute to town centre vitality and viability but also make a location more inviting to tourists.

1.1.4 There is strong policy support for the development of towns on the Island with particular focus on Newport. As the primary retail centre for the island it is imperative that it is strengthened particularly in the midst of increasing competition from mainland centres (e.g. Southampton and Portsmouth).

1.1.5 The findings of the study show that the vitality and viability of the eight town centres varies considerably. Newport, Ryde and Cowes are in the healthiest condition while considerable improvements are needed for East Cowes, Sandown, Freshwater and Ventnor.

1.1.6 The study identifies a range of priorities for each town. For Cowes, Newport and Ryde, continuing public realm enhancement will strengthen its existing customer and tourist base. The SEEDA masterplan for East Cowes creates an opportunity to drive forward tourism potential for East Cowes and address traffic management issues. Sustaining commercial activity is a priority for Shanklin coupled with public realm improvements. Consideration should be given to consolidating commercial activities in Freshwater to strengthen existing businesses. For Sandown and Ventnor, public realm and building improvements are a priority and opportunities for tourism should be pursued for their survival.

# 2 INTRODUCTION

## 2.1 The Study

2.1.1 Halcrow Group Ltd was commissioned by Isle of Wight Council to assess the 'health' of the towns of Cowes, East Cowes, Freshwater, Ryde, Newport, Sandown, Shanklin and Ventnor. The purpose of the study is to provide the Council with comprehensive data on the current performance of the Island's key towns.

## 2.2 The Importance of Town Centres

2.2.1 Successful town centres breathe life into an area; they help to define places. They attract and retain inward investment and can truly improve the quality of people's lives.

2.2.2 The importance of sustaining town centres, be it city centres or local centres, is often underestimated. In the last 30 years, the traditional structure and role of the town centre/high street has been eroded by new trends in retail development. In urban areas developers have been increasingly attracted to out of town greenfield sites which offer more opportunities to accommodate larger retail formats, better access for private vehicles and cheaper land values/rents compared to city/town centre locations which are restricted in terms of availability of sites and planning restrictions (e.g. difficulties of site assembly, conservation considerations, listed buildings, requirements to develop several storeys for mixed use, etc.). This trend has influenced shopper behaviour and expectations and this in turn is beginning to be reflected in retail operators' development preferences in town centres, that is, a preference for larger footplate retail formats.

2.2.3 Further pressure is being felt by high street traders as a result of the continued rise in on-line shopping. Although the on-line market has started from a very low base and still accounts for less than 10% of sales, nevertheless, as the recession takes hold, shoppers' behaviour is increasingly value driven and a trend has been identified in which prospective purchasers will use High Streets to compare goods and identify their preferred model of large ticket items and then browse the electronic stores or auction sites for best prices. The generation that has grown up with the computer and the internet began by downloading music and video and have moved on to buying personal comparison goods and fashion accessories on the net. As they move into the "household formation" cohort this behaviour is likely to be extended to household goods, electricals, childrenswear, etc, as well as groceries.

## 2.3 The Retail Hierarchy

2.3.1 The Island's community is serviced by a hierarchy of towns and villages which meet the population's business, retail, social and community needs. Tourism is the largest industry on the Island and attracts a strong customer base that supports the Islands many retail and leisure businesses.

2.3.2 A brief context to each town and its function in the retail hierarchy is provided in the following paragraphs.

***Newport***

2.3.3 Newport is the Island's largest town with a population of 24,100[1] and is located centrally within the Island. The Regional Spatial Strategy identifies Newport as the primary retail centre for the island and consequently attracts a higher proportion of national and international retailers. The town is under increasing pressure to retain resident shoppers who travel to mainland centres to undertake comparison shopping. Centres such as Southampton are easily accessible and offer a wider range of multiple retailers and a different shopping environment, in particular its shopping centres. The key challenge for Newport is to develop its retail and leisure offer to a standard expected of a regional shopping centre and become a desired shopping centre for its residents.

***Ryde***

2.3.4 Ryde is the second largest of the Island's towns serving a population of 23,800[1]. Known for its Victorian architecture and 800m long pier; the town is popular with tourists who benefit from direct links to the main land via a ferry service from Portsmouth. Shopping is concentrated along the High Street with a pedestrianised shopping zone. Union Street serves as the main thoroughfare for the town and the majority of leisure and financial services are located here.

***Cowes***

2.3.5 Cowes is internationally renowned as one of the UK's premier sailing centres and as a result is very popular with water leisure visitors throughout the year. Tourist numbers swell during the summer months particularly during Cowes Week. The town is well preserved and is an attraction in itself. Cowes is also an important service centre for the surrounding population (9,660[2]).

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[1] Mid-2007 population estimates, Office of National Statistics
[2] 2001 Census, Office of National Statistics

### *East Cowes*

2.3.6 East Cowes primarily serves as a local centre for resident population (4,836[2]). The town centre does not attract the level of tourists as its neighbour, Cowes, despite the many attractions located nearby (e.g. a marina, heritage centre and Osbourne House). This is evident in the type of retail and leisure offer which comprises mainly convenience retail, café and personal services. A major regeneration project is planned for the town which involves extending the town to the north east. The project will create new housing, retail and leisure developments for the town centre.

### *Sandown*

2.3.7 Sandown is a traditional seaside resort that relies heavily on the summer tourist trade. The town is characterised by its seafront, esplanade and Victorian pier where tourist accommodation and evening time leisure uses dominate. Out of season the town reverts back to being a local centre for the permanent resident population (6,550[2]).

### *Shanklin*

2.3.8 Shanklin functions as a tourist destination and service centre for the local population of over 8,000 people[3]. The town is characterised by its Old Town, a prominent conservation area which boasts many attractive Victorian thatched buildings with cultural associations and the esplanade, located a short distance away. Key retail and leisure services are located to the north of the town along the High Street and Regent Street.

### Ventnor

2.3.9 Like many other coastal towns on the Island, Ventnor is popular with tourists who visit the area's many local attractions and its renowned micro climate. Its peripheral location means that the town serves as a key centre for the local surrounding populations (6,171[1]). Town centre uses are concentrated along the High Street and Pier Street which lead to an attractive esplanade. During the summer months the town hosts many events including a carnival, town fair and Jazz Festival.

### *Freshwater*

2.3.10 Freshwater is a smaller settlement located inland to the west of the Island. Compared to the other towns in the study, Freshwater's main function is as a service centre for the local population of 5,360[4]. Much

[3] 1991 Census, Office of National Statistics
[4] 2001 Census, Source: ONS.

of the tourist trade has bypassed the town in favour of neighbouring coastal settlements such as Yarmouth. The town has suffered economic decline in recent years from the decline of manufacturing which provided key employment for the area. Anecdotal evidence suggests that many residents commute to larger settlements such as Newport for employment and the town has become a sleeping community. As a result town centre activity has also suffered which has discouraged businesses from locating in the centre.

2.3.11 The Island is also supported by a network of smaller service centres that offer basic services for their local communities. Retail is limited to grocers which provide top-up convenience goods and other smaller goods (e.g. milk, bread, tobacco, newspapers and confectionary). Leisure is confined to a small number of public houses, takeaways and cafes/restaurants. Towns and villages include:

- *Bembridge* – a popular village for tourists which contains many second homes and a number of heritage attractions. Centre uses focus on the tourist market with many restaurants, cafes and tourist accommodation.

- *Calbourne, Brightstone and Brook* – these small villages are also popular with tourists, The villages are characterised by their thatched Victorian buildings and attract many tourists. Centre uses are limited to basic retail and tourist uses.

- *St Lawrence* – the village is located west of Ventnor. St Lawrence serves primarily as a quiet residential area with limited retail and services. Nearby Ventnor serves as the main centre for the surrounding area.

- *Yarmouth* – serves as a northern gateway to the Island via a car ferry that links the mainland with Lymington. Retail and services are limited and uses are more geared to tourist interests (e.g, tourist accommodation).

- *Brading* – the village is located between Sandown and Ryde. Retail and service uses have reduced over the years and have been replaced with tourist related uses.

- *Wootton* – The village contains a small number of local shops, public houses and eateries. The village is also served by the island steam railway line.

# 3 BASELINE ASSESSMENT

## 3.1 Introduction

3.1.1 The current economic climate has brought many challenges for the Island. The collapse of key employers and a decline in overseas visitors places added strain on an economy and this in turn can impact on the viability of centres.

3.1.2 This section establishes key statistics for the Island providing a socio-economic context for the study and includes base information that can be benchmarked in the future.

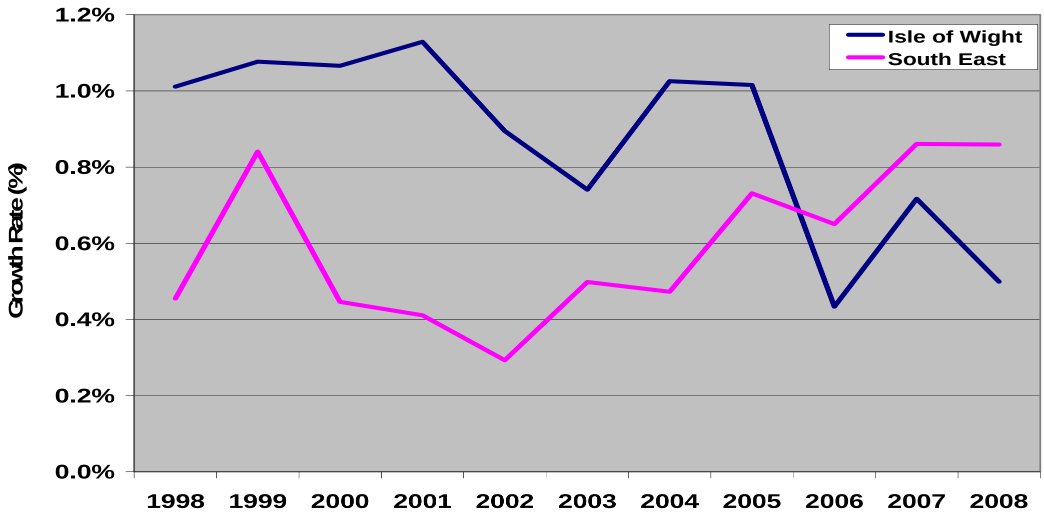
## 3.2 Socio-Economic Profile

3.2.1 An analysis of socio-economic statistics identifies key issues such as population trends and market conditions, establishes the profile of Island residents and visitors which influence retail demand and supply.

*Demography*

3.2.2 The latest population estimate (mid 2008) for the Isle of Wight is 140,200, this compares to 139,500 in the 2007 estimates. Figure 3.1 below illustrates population growth in the South East compared to the Isle of Wight over the period 1998-2008. The graph illustrates that the Isle of Wight recorded a higher rate of growth than the South East until 2006 when the Island's rate decreased to 0.4% while the regions increased to 0.7%.

*Figure 3.1 – Population Growth – South East v Isle of Wight 1998 - 2007*



*Income*

3.2.3 Average income on the Isle of Wight is lower than the South East region and Great Britain. The average gross weekly pay for the Isle of Wight is £440 compared to £523 for the South East and £479 for Great Britain[5].

*Car Use*

3.2.4 Car use data indicates mobility of an area and is often influenced by locational factors. Three-quarters of all household on the Island own one or more cars, higher than the GB average (73%). High car ownership rates are typical for regions that are not distinctly urban. The dispersal of many communities across the Island will increase the reliance on personal transport. Car ownership does not necessarily mean a correlation with car use and it is likely that residents in the more urban areas use more sustainable modes of transport.

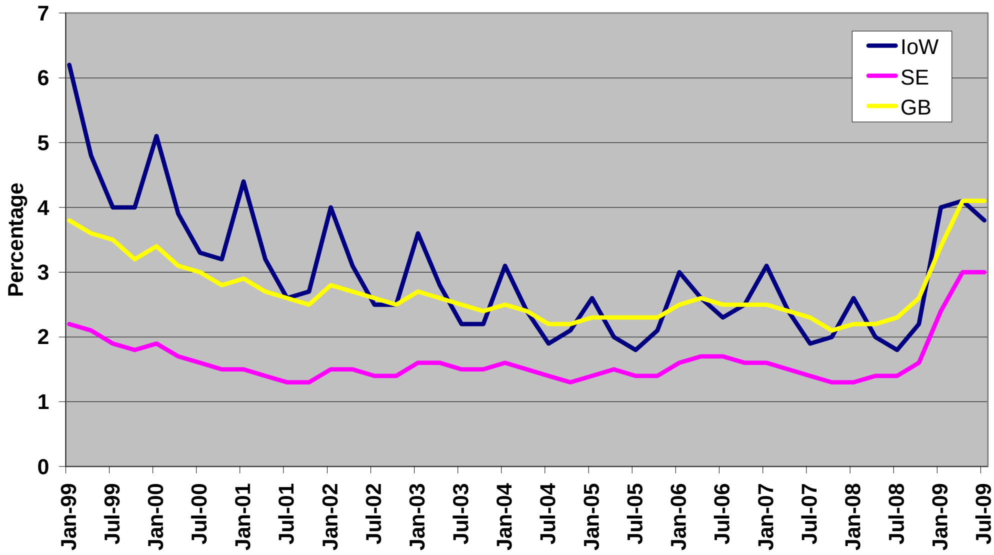
*Economy*

3.2.5 Employment figures show that the economic activity on the Island mirrors the national average with 79% of the working age group in employment. However the South East region has a higher proportion of working population actively employed at 82%.

3.2.6 The trend in Job Seekers Allowance claimants on the Isle of Wight is somewhat different to those of the South East region and Great Britain. The number of claimants is generally higher than the region and rest of the country, however, the percentage of JSA claimants has generally fallen over the past ten years from 6% in January 1999 to a low of 1.8% in July 2008 as shown in Figure 3.2. Claimants however have risen since July 2008 in the Isle of Wight, South East and Great Britain but this is likely attributed to the wider economic downturn.

[5] ONS Annual Survey of Hours and Earnings

*Figure 3.2 – JSA Claimants*



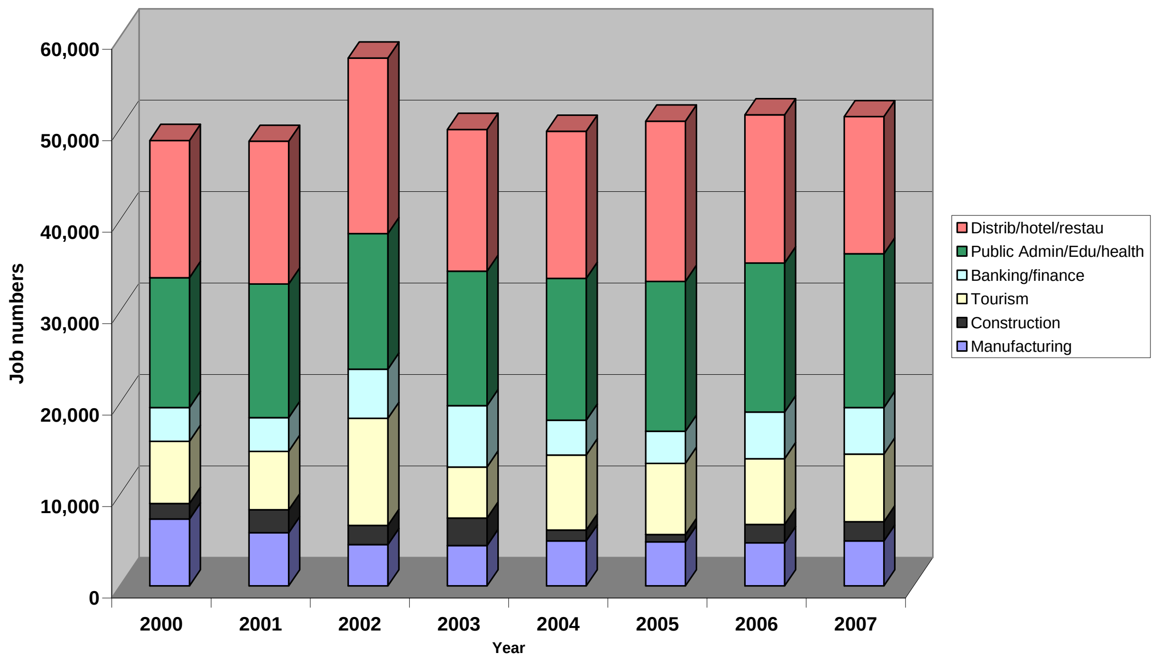

*Industry*

3.2.7 Industry on the Isle of Wight has changed over the years with a significant loss of manufacturing employment. Manufacturing has declined from 15% of total employment in 1995 to 10% in 2007[6]. This is not surprising as manufacturing has experienced continuous decline over the last 50 years. Tourism has remained an important source of employment opportunities over the same period although there has also been a small decline from 17% in 1995 to 15% in 2007. There was however a large spike in 2002 where it reached 23%. Employment in tourism is significantly higher than the rest of the region and GB where the industry provides 8% of jobs (2007 figures).

3.2.8 Figure 3.3 below illustrates the changes in the industry breakdown on the Isle of Wight. There has been a steady increase in the total number of jobs but a decline in the proportion of manufacturing jobs is evident. In line with increasing job creation in the public sector, there is also a notable rise in the public administration, education and health care sub-sectors.

[6] ONS Annual Business Inquiry

*Figure 3.3 – Employment Breakdown*




## 3.3 Tourism and Leisure

3.3.1 The tourist pound is vital for the prosperity of the Island's towns and villages and the businesses within them. The industry is worth over half a billion pounds to the Island's economy[7]. Of this figure £360 million is generated from direct tourist expenditure. Marine leisure which is synonymous with the Island brings in £25 million alone from visiting yachts. The multiplier effect generates a further £150 million to the economy from trade to suppliers and indirect employment from income induced spending.

3.3.2 In almost a decade, the number of visitors to the Island fell by 3% from 2.6 million in 1999/00 to just over 2.5 million in 2007/08. During this period there have been a number of notable peaks and troughs. Between 2004 and 2005 the number of tourists dropped considerably but has steadily increased since. Tourist figures for 2008 show that the summer months alone attracted around 600,000[8] visitors. Tourism has been further enhanced by the many events the Island has hosted, notably its annual music festivals which are attracting increasing numbers of visitors year on year.

[7] Figures sourced from the Tourist Development Plan 2005, Isle of Wight Council.
[8] 2008 tourist figures, source: Isle of Wight Tourism.

*Type of visitors*

3.3.3 The proportion of visitors who stay on the Isle of Wight has changed over the past 9 years. In 2007/08 61% of the visitors stayed over night compared to 38% day visitors[9]. This is compared to 1999/00 where 55% were staying visitors and 43% day visitors.

*Origin of overseas visitors*

3.3.4 The main origins of overseas visitors are Australia (11% 07/08), USA (11%), France (10%) and Germany (9%)[9].

*Average Spend*

*3.3.5* The average spend by visitors to the Isle of Wight varies depending on length of stay and origin. Overseas visitors staying on the Island spend on average £386 (07/08); while the average spent by domestic visitors staying on the Island is £221 (07/08). The average spent by day visitors is £38[9].

## 3.4 Emerging Baseline Issues

3.4.1 The must fundamental challenge for the Isle of Wight is sustaining its economy with particularly focus on the tourist industry. In the last decade, visitor numbers to the Island have fluctuated considerably which should be of paramount concern for an economy that depends heavily on this sector. While visitor numbers have been on the increase over the last five years, sustaining growth must be a priority.

3.4.2 For the majority of towns in this study, there is a definite link between tourism and the success of the town centre. Retail and leisure uses rely heavily on the tourist pound and this highlights the importance of maintaining and improving its centres.

3.4.3 For this reason, maintaining their attractiveness and accessibility to tourists is important. Simple physical improvements such as good signage, maintaining shop fronts, attractive lighting and street furniture, controlling litter and graffiti, etc. not only contribute to town centre vitality and viability but also make a location more inviting to tourists.

[9] Tourism Activity Monitor Reports, Isle of Wight Tourism.

# 4 Policy Review

## 4.1 Introduction

4.1.1 The review highlights key national and local policies that influence the development of the Island's town centres.

## 4.2 PPS 6: Planning for Town Centres

4.2.1 PPS 6 encourages planning authorities to adopt a positive and proactive approach to planning for the future of all types of centres within their areas (para 2.15). Having regard to the Regional Spatial Strategy and reflecting their community strategy, local planning authorities should, through the Core Strategy Development Plan Document, set out a spatial vision and strategy for the network and hierarchy of centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.

4.2.2 Paragraph 4.4 of PPS6 (2005) states that: "In order to measure the vitality and viability and monitor the health of their town centres and how this is changing over time, local authorities should regularly collect information, preferably in co-operation with the private sector, on a range of key indicators related to diversity, choice, vitality and viability.

*Proposed Changes to PPS6*

4.2.3 The proposed amendments to Chapter 4 of PPS6 (2005) acknowledge that town centre health checks should be used to inform judgements about the impact of planning policies and development proposals on town centres. The list of key indicators is proposed to be amended to include the collection of data on the length of time properties and key site have been vacant or under undeveloped and the threat of tourism and it's impact on the perception of safety.

## 4.3 Draft Planning Policy Statement 4

4.3.1 The emerging PPS 4: Planning for Sustainable Economic Development responds to the changing economic climate and focuses on protecting and sustaining economic growth. As a result policy encourages local authorities to continue promoting economic development opportunities which include retail development. The key changes to retail policy will be the removal of the 'needs' test for new retail development. Instead, an 'impact' test will be applied to new retail development which seeks to protect town centre vitality and viability from new retail development. Local authorities will also be required to plan for consumer choice when developing policies and ensure balanced retail offer by supporting smaller shops and markets.

## 4.4 Regional and Local Policy

### *South East Plan*

4.4.1 The South East Plan (SEP) sets out a vision to improve the quality of life, measured by the well being of its citizens, the vitality of its economy, the wealth of its environment and the prudent use of natural resources.

4.4.2 With regards town centres, the SEP states that to meet the requirements of Planning Policy Statement 6, the focus should be on the growth and development of existing centres where a range of services and high quality environments can be created that are accessible to all. Newport is identified as a Secondary Regional Centre which will be the focus for regional investment and development.

4.4.3 The SEP sets out a strategy for the Isle of Wight that is based on managed economic growth and regeneration to provide for the unique characteristics and needs of the Island, including:

- localised labour markets
- the Island's relative inaccessibility
- above average unemployment,
- lack of locally available skills
- a changing tourism sector
- access to affordable housing.

4.4.4 *Policy IW1* of the SEP states that key agencies should give priority to investment decisions that help to realise a step change in the Island's economic performance through a range of measures focused on attracting inward investment. Ryde, The Bay, Ventnor and West Wight are singled out as priority areas where inward investment and development should be supported to facilitate regeneration. The Medina Valley is highlighted by the SEP as a priority area for infrastructure development and inward investment. Support is also directed towards urban renewal and improving tourism offer in terms of quality and product value.

4.4.5 The SEP goes on to state that given the unique situation of the Island, tailored solutions will be required to tackle these issues. The South East England Development Agency's smart growth approach should be utilised in:

- attracting high value-added businesses
- upgrading skills
- increasing economic activity
- seeking to attract higher value tourism

4.4.6 In addition, bespoke tourism development strategies are needed to address the lack of high quality hotel and conferencing facilities, to provide infrastructure and services that support tourism growth, to support tourist related training opportunities and to identify opportunities to redevelop redundant tourist facilities.

### *Unitary Development Plan (Adopted 18th May 2001)*

4.4.7 The Unitary Development Plan (UDP) will be replaced by the Core Strategy Development Plan Document which is at draft stage awaiting approval. The UDP remains the primary reference for development policy for the Island.

4.4.8 The UDP recognises the economic reliance of the Island on the tourism industry. In response, tourism objectives seek to improve amenities and services and regenerate tourism resort areas.

4.4.9 The tourism policies promote development that will improve and extend the tourist offer across the Island. Proposals for new hotels, touring caravan sites, holiday accommodation and leisure parks are all deemed acceptable in principle where they do not conflict with other plan policies. The UDP is supportive of growth in the tourism industry, particularly where it is focused on existing tourist centres.

4.4.10 Closely linked to the tourism industry are the UDP's policies on retail and town centres. The UDP sets out the following objectives for retailing on the Island:

- promoting viability and vitality of the Island's town centres
- ensuring adequate provision of sites for retail growth
- providing for local shopping needs
- promoting the town centres as a focal point for the community
- ensuring new retail growth promotes sustainable travel

4.4.11 The UDP policies support the development of retail proposals in and around town centres and seek to protect the retail function of the centres. The loss of retail, leisure, cultural or recreational uses which are contributing to vibrancy and vitality will be restricted. The UPD identified a number of key sites suitable for major shopping developments, the majority of which some of have been successfully developed for new retail (e.g. Sainsburys at Petticoat Lane and Riverway (filling station) and Coppins Bridge Multiplex and Retail Park). Only one site remains undeveloped, Fire Station site at Newport, which was granted planning permission for mixed use including retail.

4.4.12 Clearly the UDP is seeking to protect town centres as retail cores and to promote retail development as appropriate, through the use of town centre boundaries and retail-only frontage policies.

4.4.13 The transport objectives of the UDP are to reduce the need to travel, especially by car and to increase the opportunities for cycling and walking.

4.4.14 To achieve this, transport policy seeks to locate new developments which will create significant travel demand within existing defined settlements which are easily accessible by public transport, bicycle and on foot. They require new developments attracting a significant number of persons, such as large retail uses, to demonstrate how they will reduce travel via private car. The council will also need to be satisfied that provisions for Public Transport, bicycle and foot travel are adequate.

4.4.15 Developments in and around town centres are usually highly accessible on foot, by bicycle or by public transport and can therefore contribute to these transport policies.

4.4.16 The Council's Conservation policies aim to promote, protect and enhance the historic built environment. The majority of the town centres of Newport, Ryde, East Cowes, Cowes and Ventnor are within conservation areas. A small area of Shanklin's town centre is also within a conservation area.

4.4.17 Opportunities to protect and enhance the historic cores of the Island's towns would help to achieve these policies.

### *Core Strategy Development Plan Document (December 2008)*

4.4.18 The Core Strategy will form part of the new Local Development Framework. It was submitted to the Secretary of State in December 2008, with a view to Examination Hearings occurring in autumn 2009. Following discussions with the independent Planning Inspector, the Council suspended the Examination and sought the withdrawal of the Core Strategy in order to re-submit an amended and improved document. At the time of the publication of this study, the Council had not received the formal Directive to Withdraw from the Secretary of State. It is expected that the main principles established in the Core Strategy submitted in 2008, will developed where necessary and appropriate in the revised Core Strategy.

4.4.19 The Core Strategy submitted in 2008 and currently pending withdrawal, outlines the Island in 2026 Vision:

> *Eco Island is a bright vision for the future, a vision that aims to transform our community into a world renowned Eco Island. A healthy place where residents can enjoy a healthy lifestyle and benefit from a buoyant economy and a secure future. An Eco Island with a thriving economy, a real sense of pride and a place where residents and visitors feel safe and are treated with respect.*

4.4.20 The spatial and locational strategies for the Island state that economic led regeneration will focus primarily on key regeneration areas to create strong, sustainable and inclusive communities. Concentrated development at Medina Valley (Newport, Cowes and East Cowes), Ryde and The Bay (Sandown, Shanklin and Lake) will allow the growth of urban centres and protection of rural areas. This will be led through a number of focussed strategies.

4.4.21 The strategy for the Medina Valley supports the development of Newport as the primary retail centre for the Island with secondary retail provision encouraged in Cowes and East Cowes.

4.4.22 In Ryde, the strategy is to promote its retail function and tourist role and to identify projects as part of the townscape Heritage Initiative to reuse historic and locally important buildings.

4.4.23 The strategy for The Bay includes the promotion of Sandown and Shanklin as secondary retail locations, the diversification of the local economy and improvements to the Sandown Esplanade to include tourist accommodation and facilities.

4.4.24 Ventnor and Freshwater are regarded as smaller regeneration areas, where the strategy is to protect the tertiary retailing function of the town centres and to encourage new employment opportunities.

4.4.25 The wider tourism, leisure and recreation strategy promotes the development of sustainable proposals will which improve the quality and diversity of tourist facilities, accommodation and infrastructure.

## 4.5 Local Transport Strategy

4.5.1 The Island Local Transport Plan sets out a five year strategy for improving accessibility across the island with particular onus on sustainable travel. Consideration is given to the objectives of national and regional plans and policies. The LTP also looks to the long term with a 20 year vision that will tie in with future regeneration initiatives. The Plan is underpinned by seven key objectives:

- To increase accessibility
- To encourage and support economic prosperity and regeneration
- To make Island roads safer
- To improve local air quality and conserve and enhance the environment
- To tackle congestion
- To ensure effective management of the highway network
- To achieve value for money solutions

4.5.2 A number of area based strategies are put forward which will significantly improve towns identified in this study including:

- Cowes Waterfront – maximise investment opportunities along the waterfront.
- Sandown Bay – supports a range of short and medium term actions for regeneration and transport infrastructure improvements.
- Ryde – spending will focuses on improving public areas, seating, road and pavements across the town.

4.5.3 The LTS is supported by a series of dedicated sub-strategies that focus on improving existing public transport infrastructure (Bus Strategy, Bus Information Strategy and Rail Strategy) as well as measures to encourage more sustainable travel choices (Smarter Choices Strategy).

## 4.6 Supplementary Planning Guidance

***Cowes Waterfront – A vision for the Medina Valley SPG (July 2003)***

4.6.1 The Cowes waterfront initiative aims to attract new investment to provide the opportunities, facilities and attractions that both local people and visitors can enjoy. Investment will enable the growth of local businesses and the attraction of new businesses.

4.6.2 The project is divided into 4 zones. Zone 1 incorporates the town centres of Cowes and East Cowes. Key opportunities in the zone include:

- Improved linkages to Yacht Haven and High Street;
- Improved public transport interchange at Cowes;
- New waterfront access;
- Additional Shops, cafes and restaurants;
- New mixed use development – hotels, visitor centre and retail; and
- Comprehensive redevelopment and strengthening of East Cowes town centre.

***Ryde Public Realm Strategy SPD (July 2005)***

4.6.3 The Ryde Public Realm Strategy was prepared to establish a locally distinctive framework to guide future regeneration proposals in Ryde. The Strategy indicates that changes in the patterns of tourism and a gradual economic decline in the town since the 1960s have led to a loss of economic prosperity.

4.6.4 The Strategy was developed to ensure the SRB secured funding was used to deliver sustainable and appropriate public realm solutions in Ryde. A number of key areas were identified as central to improving the public realm in Ryde town centre. These included:

- The High Street;
- The Town Square;
- Rear Courtyards;
- Ryde Esplanade; and
- Western and Eastern Gardens.

# 5 Town Centre Health Check Assessment

## 5.1 Introduction

5.1.1 Government policy is striving to protect the vitality and viability of the 'town centre'. By protecting centre vitality and viability this allows for sustainable town centres that bring enormous community benefits. Town centre health checks are recognised as important tools in monitoring the progress of centres

5.1.2 Health checks are an effective monitoring tool that measure the vitality and viability of a town centre. The vitality of a town centre is defined by how lively and busy a town centre is and viability is a measure of its capacity to attract ongoing investment. Combined, these important factors provide an indication of the health of a town centre. Changes to a town's health can be measured through consistent monitoring of a town's heath which can help inform future planning decisions.

## 5.2 Methodology

5.2.1 In line with guidance from PPS 6: Town Centres, the assessment will identify and assess a range of quantitative and qualitative indicators to determine the vitality and viability of the eight town centres. PPS 6 identifies key performance indicators that together allow for a comprehensive assessment of town centre vitality and viability. Indicators chosen for the assessment include:

- Diversity of uses
- Capacity for Town Centre Growth
- Retailer Representation and Retailer Requirements
- Rental and Yield Values
- Vacant Units
- Footfall
- Quality of Offer
- Accessibility
- Crime and Safety
- Quality of Town Centre Environment
- Public Amenities
- Public Perception

5.2.2 Appendix 1 outlines how each of the above indicators was assessed.

## 5.3 Summary Findings

5.3.1 Figure 5.1 summaries the findings of the Health Check Assessment for each centre using a traffic light system. The colour coding denotes the following:

- **Green** – represents a positive score where no action is required.
- **Amber** –equals an average score where action is required but is not considered a priority
- **Red** – represents a poor score and where action is required.
- **N/A** – refers to information that has not been obtained (e.g. rental and yield values for some towns) or baseline data that requires future monitoring to identify positive or negative changes (e.g. footfall levels).

5.3.2 The scoring is based on the findings of the Health Check Statements for each town which are presented in this section.

**Table 5.1 - Health Check Summary Findings**

| | | Cowes | East Cowes | Freshwater | Newport | Ryde | Sandown | Shanklin | Ventnor |
|---|---|---|---|---|---|---|---|---|---|
| Diversity of Uses | Balance of floorspace | Good | Poor | Poor | Good | Good | Poor | Good | Good |
| | Change in units | Good | N/A | Poor | Average | Average | Average | Average | Average |
| Capacity for Growth | Opportunities for development | Good | Good | Average | Good | Average | Good | Average | Average |
| Retailer Representation & Requirement | Retailer Representation | Average | Poor | Poor | Good | Poor | Poor | Poor | Poor |
| | Retailer Requirement | Average | N/A | N/A | Good | Good | Poor | Average | Poor |
| Retail Rent & Yields | Retail Rents | N/A | N/A | N/A | Good | Good | N/A | N/A | N/A |
| | Retail Yields | N/A | N/A | N/A | Average | Average | N/A | N/A | N/A |
| Footfall | Footfall | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Accessibility | Traffic Management | Average | Poor | Good | Poor | Average | Average | Good | Good |
| | Parking | Average | Average | Average | Poor | Poor | Poor | Average | Average |
| | Public Transport | Average | Average | Average | Good | Good | Good | Good | Average |
| | Walking | Average | Average | Average | Good | Good | Good | Average | Average |
| | Cycling | Average | Average | Poor | Good | Average | Poor | Average | Average |
| | Disabled Access | Average | Average | Average | Good | Average | Average | Average | Good |
| Crime & Safety | Safety | Good | Average | Good | Good | Good | Good | Good | Good |
| | Crime Incidences | Good | Good | Good | Average | Average | Average | Good | Good |
| Quality of Environment | Streetscape | Good | Poor | Average | Good | Average | Poor | Good | Good |
| | Building & Shop Fronts | Good | Average | Poor | Average | Good | Poor | Average | Average |
| | Street Maintenance | Good | Average | Poor | Good | Average | Average | Average | Good |
| | Vandalism | Good | Good | Average | Good | Good | Average | Good | Good |
| | Landscaping | Good | Average | Average | Good | Average | Poor | Average | Average |
| Quality of Retail | Quality | Good | Poor | Poor | Good | Average | Poor | Average | Good |
| | Range | Average | Poor | Poor | Good | Good | Average | Average | Poor |
| Crime & Safety | ATMs | Good | Average | Good | Good | Good | Good | Average | Average |
| | Public Toilets | Good | Good | Good | Good | Good | Good | Average | Average |
| | Signage | Good | Poor | Average | Good | Good | Average | Good | Good |
| | Seating | Good | Average | Average | Good | Average | Average | Average | Average |
| | Shop Mobility | N/A | N/A | N/A | Poor | Poor | N/A | N/A | N/A |
| Public Perception | Content with Town Centre | Good | Good | Poor | Average | Good | Poor | Average | Poor |
| | Need for Improvement | Good | Poor | Poor | Average | Good | Poor | Poor | Poor |

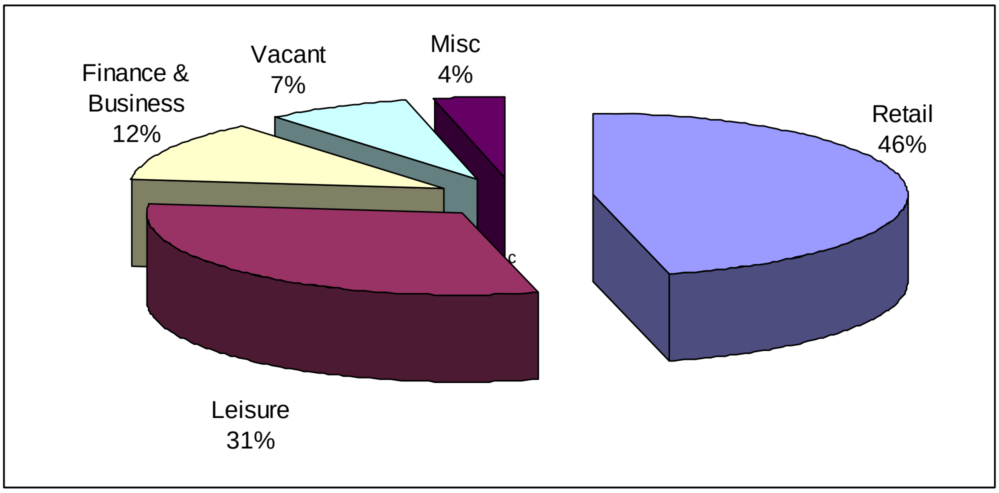
Good
Average
Poor
N/A

## 5.4 Cowes

### Diversity of Uses

5.4.1 Cowes contains 22,930 sqm of town centre floorspace (ground floor only). Typically retail accounts for the greatest proportion of floorspace (46%). The town has a high proportion of leisure floorspace which reflects the tourist market (e.g. cafes, restaurants, etc.).

*Figure 5.1 - Breakdown of floorspace by use within Cowes.*




*Source: GOAD and Halcrow Group Ltd 2009*

5.4.2 Table 5.2 shows the changes in the number of business units by use, in the town centre since the last GOAD survey in November 2008 shows an increase in the number of retailers and leisure businesses in the town centre.

*Table 5.2 - Diversity of Units 2008 – 2009, Cowes*

| Use | 2008 | 2009 |
|---|---|---|
| Comparison | 66 | 69 |
| Convenience | 8 | 10 |
| Retail Service | 16 | 16 |
| Leisure | 42 | 44 |
| Finance & Business | 27 | 21 |
| Miscellaneous | 7 | 7 |
| Vacant | 12 | 10 |

*Source: GOAD and Halcrow Group Ltd*

5.4.3 Leisure uses account for almost the same amount of comparison retail as expected of a popular tourist destination. Retail activity is focused along the High Street where mainstream retail and leisure services are located. Bath Road and Birmingham Road contain a higher proportion of niche retailing and leisure uses. Upper floors are well utilised; the majority are in use as residences which not only promote diversification but also create a safer town centre environment.

5.4.4 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Growth

5.4.5 There has been a great deal of investment to improve the town centre of Cowes which has ensured that there are a variety of retail uses. There are a number of opportunities within Cowes that offer the potential for future growth.

5.4.6 The most significant would be to develop the town centre to the east and provide improved links to the marina area. This extensive development will further improve the town centre environment with links to the waterfront while also providing a greater area of retail space for the town centre. This area to the south of the Red Funnel Ferry Terminal is currently used primarily as a boat yard but could be better utilised if it became part of the town centre.

5.4.7 A further opportunity lies to the east of Birmingham Road where the conversion or development of retail space would match that of the opposite side of the road thus providing a more formal extension to the main High Street area to the north.

5.4.8 There is also an opportunity to develop the Woolworths Store at 6 High Street which is currently vacant. This large unit could be developed to provide a mixed use scheme including ground floor retail and residential units above.

### Retailer Representation and Retailer Requirements

*Retail Representation*

5.4.9 Convenience retail is represented by two medium sized supermarkets, Sainsburys and Co-op which are located centrally. Other types of convenience retail on offer include a small range of bakers, butchers, off licence and a number of CTNs/grocers all located along the centre thoroughfare.

5.4.10 Comparison retail representation includes a number of well known quality brands such as White Stuff, Fatface and Henri Lloyd, though the majority of comparison retail offer is made up of independent retailers.

### *Retail Requirements*

5.4.11 In the last year Cowes has attracted interest from three national retailers including clothing retailers, The Original Factory Shop and Country Casuals as well as Superdrug Stores the personal goods retailer. Table 5.3 outlines retailer inquires for Cowes.

*Table 5.3 - Retailer Requirements*

| From sq ft | To sq ft | Class | Retailer |
|---|---|---|---|
| 7000 | 15000 | All | The Original Factory Shop |
| 2000 | 6000 | All | Superdrug Stores Plc |
| 800 | 1200 | All | Country Casuals |

*Source: FOCUS*

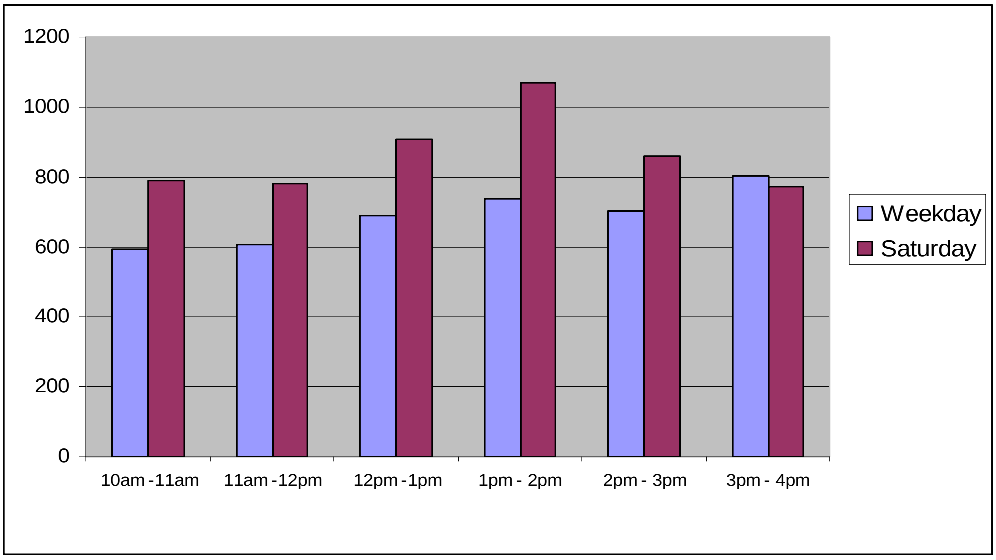
### ***Vacant Units***

5.4.12 Cowes contains 10 vacant units which equates to 7% of total floorspace in the town centre. This compares better than the UK average for town centres (10.24%). The number of vacant units has decreased since November 2008 when the last GOAD survey was undertaken and suggests an increase in retailer activity. The majority of vacant units and buildings are located along High Street (6) although the number of vacant retail units is low (2). The remaining vacancies are non-retail uses including a vacant public house. Planning permission was granted in 2007 to redevelop the vacant public house for mixed use including retail at ground level.

### ***Pedestrian Flows***

5.4.13 A footfall survey revealed that on average 689 people passed along the High Street on the hour between 10am and 4pm. This figure increased to 863 on a Saturday. Peak times during the day were between 1pm and 2pm with averages of 738 and 1,068 for weekday and Saturday, respectively.

*Figure 5.2- Pedestrian counts on High Street*




*Source: Footfall Survey, Research & Market Plus 2009.*

## *Accessibility and Connectivity*

### *Traffic Management*

5.4.14 Traffic and parking restrictions along the High Street has diverted traffic to outlying streets. The town benefits from no through traffic. Heavy traffic was evident at the non-pedestrianised section of the High Street where vehicles are given access to the Red Funnel ferry terminal and marine uses at Town Quay. Levels of traffic were low to the South of the town along Birmingham Road and Beckford Road and also to the North at Market Hill and Bath Road.

### *Parking*

5.4.15 With regards to parking, restrictions are in place along the High Street. Parking spaces are limited to disabled parking spaces and short stay spaces between the two pedestrian zones.

5.4.16 Two main public parking zones: Brunswick Road (50) and St Mary's Road car park (80). A long stay car park is located at the edge of the centre on Park Road. Anecdotal evidence suggests that the long stay car parks are used by commuters travelling by ferry to the mainland.

5.4.17 Free parking is available on some periphery streets for short stay (e.g. 30 mins). While this allows spaces to be used more efficiently it does discourage town centre users from staying longer in the centre.

5.4.18 On the day of visit, few on-street spaces were available. St Mary's Road car park was running at around 90% capacity while Brunswick Road car park was 50% full. It was noted that St Mary's car park will close to accommodate maintenance works of under ground water network. It is anticipated that this will place further pressure on car parking spaces. Current resident permit parking policy[10] allows permit holders to park in public car parks in Cowes free of charge. This has contributed to capacity issues and a reduced the incentive to use park and ride sites at Somerton and Saunders Drive. As a result these facilities are under-used.

*Public Transport*

5.4.19 Cowes is connected to other parts of the Island by Southern Vectis buses via the No. 1 route to Newport which stops at smaller centres on route. Bus nodes in the town centre are located at the Red Funnel terminal and Co-op store.

5.4.20 A taxi rank is also situated on Carvel Lane with space for approximately 8 vehicles. A taxi rank is also located at the Red Funnel ferry terminal at Fountain Quay.

5.4.21 Cowes is linked to the by a high speed passenger ferry service. Frequent services run daily to/from Southampton and all year round (with exception for Christmas Day).

*Walking and Cycling*

5.4.22 Pedestrian zones along the High Street create a safe and attractive environment for pedestrians. The narrow nature of non-pedestrianisation streets result in less pavement space for pedestrians.

5.4.23 On the day of inspection there were many cyclists travelling through the town centre including what appeared to be local cyclists and tourist cyclists. Cycle lanes were not evident within the town centre which may be attributed to lack of road space due to the narrowness of streets. No cycle spaces were evident at traffic lights.

5.4.24 Cycle parking facilities are in situ across the town centre with parking located at the 2 car parks, along the pedestrian zones including outside the two main supermarkets (Co-op and Sainsburys).

*Disabled Access*

5.4.25 Cowes provides good disabled access within the town centre. Parking facilities are adequately provided with multiple designated parking spaces available on all streets within the town centre. A ‘dial-a-bus’

[10] Permit holders are entitled to free parking at short stay Council car parks (max 3 hours), shoppers car parks (max 5 hours) and long stay car parks (max 8 hours).

service operated by Wightbus provides connections to Newport and Gurnard. The service runs five days a week.

### *Quality of Town Centre Environment*

5.4.26 Overall, the town centre environment is very good in Cowes. It is evident businesses are investing in their shop fronts and appearance. The majority of shops adopt traditional frontages with a small mix of modern formats that blend well into the street vernacular. A number of buildings on High Street could benefit from refurbishment.

*Figure 5.3 – Good versus poor building frontages on High Street*


5.4.27 There was no evidence of litter or graffiti on the High Street indicating effective street cleaning and maintenance.

The town centre is aesthetically pleasing with obvious investment in soft landscaping (hanging baskets) and street art. Art work has been incorporated into the pavement creating a distinctive character for the centre.

*Figure 5.4 - Street paving on High Street and use of mural to disguise a gap site.*

5.4.28 Cowes benefits from an attractive streetscape where investment in maintenance and upgrading appears evident.

5.4.29 The Arcade would benefit from improvement works particularly as it serves as a gateway to the town centre for pedestrians exiting the ferry terminal.

*Figure 5.5 – Poor entrance to ferry terminal*

### Quality of Retail Offer

5.4.30 Town centre uses in Cowes Town Centre are influenced by tourism. As a result the centre has an abundance of cafes and restaurants, sailing shops (e.g. clothes and yacht supplies), high-end gift shops and niche retailers. The overall quality of retail offer is good which is likely to be in response to the level of middle to higher income visitors that visit the town. Cowes offers a particularly high number of quality independent retailers which creates a more unique shopping experience for customers.

### Crime and Safety

5.4.31 The mix of uses along the High Street owing to the use of upper floors for housing ensures greater activity through the day and evening. Pedestrian safety is maximised by the application of pedestrian zones. Pedestrian safety is also promoted using 20 mph speed restrictions through the town centre.

5.4.32 CCTV is installed at various locations in the town centre. Neighbourhood Watch is in operation within the town centres with signs visible at Carvel Lane.

5.4.33 Crime statistics provided by Hampshire Constabulary (HC) show that incidences were highest on High Street (142) and mostly attributed to anti-social behaviour (33) and violence against a person (23). Other hot spots for crime incidences include Terminus Road where there was a higher level of incidences of shop theft (17) and Cross Street and Shooters Hill (mainly violence against a person).

### Public Amenities

5.4.34 Cowes meets a desired level of public conveniences. Street benches are located along the High Street. Public toilets are located to the north of the High Street at Bath Road. Litter bins were prevalent throughout the High Street.

*Figure 5.6 – Example of public amenities in Cowes.*

5.4.35 Telephone kiosks are located central at High Street along with a cluster of other public conveniences see picture. ATMs are distributed across the town centres at bank locations. Additional ATMs are present at Sainsburys.

5.4.36 Signs for direction where visible at regular intervals along the High Street and provided directions for key attractions in the town. Town centre information points are located at various points including the two car parks and within the pedestrian zone.

*Figure 5.7 Examples of good signage in Cowes.*


**Public Perception**

5.4.37 63 respondents were interviewed in the street survey at High Street, Cowes. 38 were local residents and 25 were visitors. 80% of the survey respondents stated that there was nothing they disliked about the town centre in Cowes. Inadequate Car parking provision, a lack of leisure facilities and poor standard of street cleanliness were identified as small areas of perceived public concern amongst the other 20%.

5.4.38 In terms of suggesting improvements in the town centre, 45 respondents didn’t have any particular ideas. 13% suggested a better range of shops and 5% wanted to see the cleanliness of the streets being improved.

5.4.39 The 25 visitors interviewed in the survey stated that the best things about Cowes town centre were the ambience, the amount of street entertainment and events on offer and the range of cafes and restaurants.

## 5.5 East Cowes

### Diversity of Uses

5.5.1 Floorspace information was not available for East Cowes. An on-street survey of units across the town centre was undertaken. A total of 39 business units were recorded in the centre of which 30 are occupied for retail and retail service uses. Leisure uses account for 9 units in the town centre. Other town centre uses such as business, financial and office uses are present. Residential uses are prominent and occupy the majority of upper floor accommodation.

5.5.2 A summary of key town centre uses is outlined in Table 4.4.

*Table 5.4 - Diversity of Uses within East Cowes*

| Use | 2009 |
|---|---|
| Comparison | 15 |
| Convenience | 3 |
| Retail Service | 8 |
| Leisure | 9 |
| Vacant | 4 |
| **Total** | **39** |

*Source: Halcrow Group Ltd 2009*

5.5.3 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Expansion

5.5.4 An opportunity for growth of the East Cowes town centre is a site on the corner of Well Road and Castle Street. A number of other sites offer the potential for growth including Castle Street and Ferry Road.

5.5.5 The East Cowes town centre is relatively small particularly when compared to the town of Cowes. Much of the area is dominated by industry adjacent to the waterfront and residential uses to the south and east of the centre.

5.5.6 In order to improve the town centre, a masterplan has been produced for East Cowes to encourage regeneration. The scheme includes major mixed use development, over 500 new homes, and the relocation of the ferry terminal marshalling area and industry which will enable to development of a hotel on the parking site off Castle Street. The masterplan area covers a large area to the north of the town centre which is currently industrial. The industrial uses will be relocated to accommodate new retail and residential development.

5.5.7 With the relocation of the Ferry terminal marshalling area, the car park off Ferry Road can be developed for additional retail or mixed uses. Once industrial uses are relocated from the northern end of Castle Street there is the potential for additional retail uses as an extension of the existing town centre between Well Road to the south and Old Road to the north.

### Retailer Representation and Retailer Requirements

#### *Retailer Representation*

5.5.8 The vast majority of retailers are local retailers which is characteristic for smaller settlements. Somerfield and Lloyds Pharmacy represent the only multiples for the centre. There is an apparent lack of leisure uses in the town centre which is limited to a library and heritage centre and one public house which represents the extent of centre's evening time economy.

#### *Retailer Requirement*

5.5.9 There are no records of retailer interest for East Cowes.

### Rental and Yield Values

5.5.10 Information on retail rents and yields was not available.

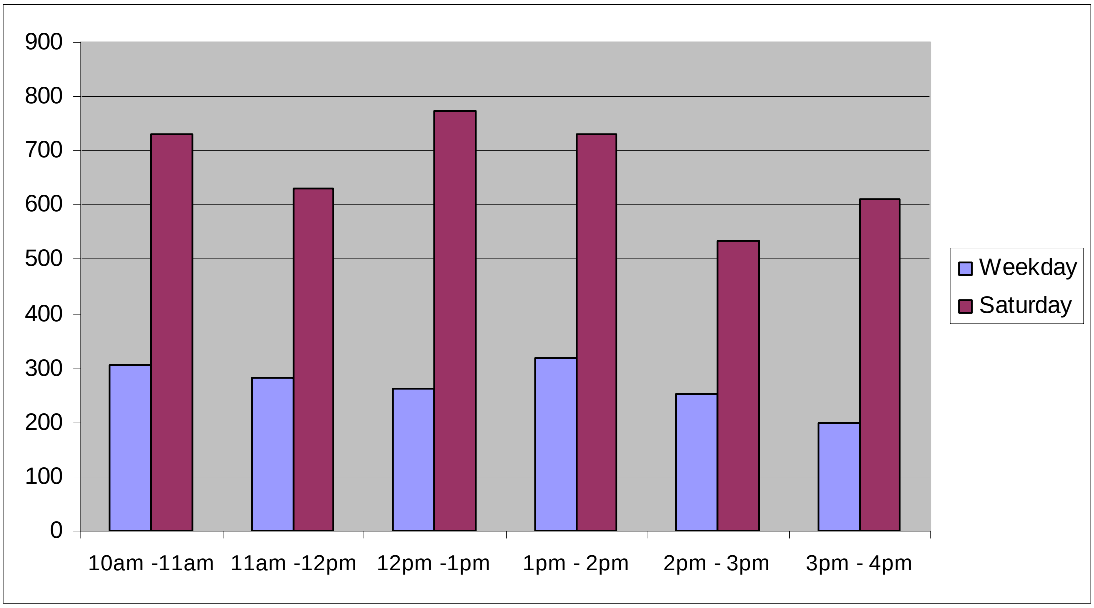
### Vacant Units

5.5.11 An on-street survey of units in East Cowes recorded 4 vacancies. This equates to 9.8% of total commercial units in the town centre; lower than the UK average (10.24%). Vacant units were recorded on Castle Street (2), York Avenue (1) and Clarence Road (1).

### Footfall

5.5.12 A footfall survey was carried out on York Avenue on a weekday and a Saturday. Weather conditions for both days were dry. Survey findings revealed that on average 270 people passed along the High Street on the hour between 10am and 4pm. The figure more than doubled to 669 on a Saturday. Peak times were recorded between 1pm and 2pm where counters recorded 318 and 732 for the weekday and a Saturday respectively.

*Figure 5.8 Pedestrian counts on York Avenue, East Cowes*




*Source: Research & Market Plus 2009*

### Accessibility

*Retailers Traffic Management*

5.5.13 Traffic management is a clear issue for the town centre. Due to the large volume of traffic generated from the Red Funnel car ferry and the floating bridge that connects East and West Cowes, a one-way system is in place to manage traffic flows. While the system diverts traffic exiting the ferry terminals from the town centre, vehicles intending to board to the ferry terminals must travel through the centre via York Avenue. The close proximity of the Red Funnel ferry terminal and the lack of available waiting area causes serious congestion problems. York Avenue effectively becomes a waiting zone for boarding vehicles. On the day of survey, a queue of vehicles stretched along York Avenue.

*Parking*

5.5.14 The majority of parking in the town centre is on-street and is free for a limited time (30 minutes). A designated public car park is located on Well Road offering paid parking. The car park was full on the day of survey while available on street spaces were limited which suggests a need for more parking provision. As part of the SEEDA masterplan for East Cowes, Well Road car park will be redeveloped to accommodate a new foodstore with associated parking. Public car parking will be provided at Link Road.

*Public Transport*

5.5.15 The town is served by the Island bus network (Southern Vectis) with frequent connections to Newport (No.5) and Ryde (No.4) which terminate at the Red Funnel Ferry Terminal. Access to nearby West Cowes is via a short ferry crossing across the Medina, locally known as the 'floating bridge'. A direct ferry service connects East Cowes to Southampton with services running on the hour for vehicles, foot passengers and cyclists. Service operates daily and all year round (with exception for Christmas Day).

*Walking*

5.5.16 A pedestrianised lane connects York Avenue and Well Road and beyond to the Well Road car park which benefits from a pelican crossing. Zebra crossings are in place at the junction of York Avenue and Ferry Road. However there is no direct crossing from York Avenue and Clarence Road, which requires pedestrians to cross three roads (York Avenue, Ferry Road and Clarence Road).

*Cycling*

5.5.17 There are no cycle lanes or cycle spaces on roads within the town centre. Cycle parking is available on York Avenue and were not in use at the time of survey.

*Disabled Access*

5.5.18 Dropped kerbs are in place at all crossing points on streets throughout the town centre. Textured paving has been introduced at key crossing points on each street. Disable parking is available on Castle Street, York Avenue and Clarendon Street. Additional parking is available at Well Road car park.

5.5.19 A 'dial-a-bus' service operated by Wightbus provides connections to Newport, Ryde and Wootton for the elderly and persons with disabilities. The service runs on Mondays only.

**Quality of Town Centre Environment**

5.5.20 A survey of the general street environment on key shopping streets showed a lack of maintenance to street pavements, street furniture and landscaping. The north section of York Avenue is poorly maintained and there has been very little investment in shop frontages with the exception of a recently opened gift/homeware shop.

5.5.21 The centre has a number of attractive architectural features, notably the terraced development to the south of York Avenue. However, poor maintenance of the building fronts has created a run down feel to the street. The quality of environment is more notable on Clarence Road where there is clear investment in the maintenance of shop frontages.

*Figure 5.9 – Good quality shop fronts (l) versus poor quality (r)*


5.5.22 Soft landscaping, predominantly in the form of flower baskets and boxes, are located intermittently along York Avenue. Tree planting at the junction of York Avenue and Clarence Road has been incorporated into the street furniture creating an attractive focal point for the town.

*Figure 5.10 - Public seating and soft landscaping on York Avenue*

5.5.23 It is evident that public realm improvements have been carried out at the busier sections of York Avenue and the pedestrian zone between York Avenue and Well Road in the last 10 years.

### Quality of Retail Offer

5.5.24 Retail offer comprises a limited range of comparison retailers including a florist, chemist and gift/homeware, shoe and stationary retailers. Convenience retail includes a Somerfield store, grocery store (with in-store post office) and confectioners/newsagents. Additional retail is provided by a small number of niche retailers (e.g. antiques, health, fishing supplies and pet supplies). Retail services are limited to two café/restaurants on York Avenue. Personal services, namely hair salons are located on York Avenue and Clarence Road.

5.5.25 East Cowes could benefit from a greater mix of town centre uses, in particular for leisure. The limited amount of comparison retailers suggests that the majority of residents shop at other centres. The proposed SEEDA development is likely to bring positive change for the East Cowes. A new hotel and town square will attract more tourists and the proposed retail development, notably the proposed Waitrose store, will encourage linked shopping trips to the rest of the town centre and strengthen the Centre's economy.

### Crime and Safety

5.5.26 Pedestrian crossings at York Avenue, Ferry Road and Wells Road promote pedestrian safety. Similar to Cowes, the use of upper floors as residences creates safer streets even when ground floor uses are closed or not in use.

5.5.27 There was no evidence of graffiti on the day of survey and while litter was evident, it was minimal.

5.5.28 CCTV is not in operation in East Cowes

5.5.29 Consultation with Hampshire Constabulary showed that antisocial behaviour can be a problem for East Cowes and but largely occurs around the Esplanade. Crimes statistics show that incidents of crime is highest on York Avenue (64) and attributed to anti-social behaviour and violence against a person. Other hot spots for crime reportings include Adelaide Road (44) mainly due to anti-social behaviour and Clarence Road (42) where incidents are high for violence against a person and theft.

### Public Amenities

5.5.30 The town centre meets an adequate range of public conveniences. Most public conveniences such as public seating, litter bins, signs and ATMs are clustered around the junctions of York Avenue and Clarence Road.

5.5.31 An information point is available on York Avenue offering directions to key attractions and public services. Public toilets are present and located on Osborne Road. Shop mobility is not available in the town centre which is expected for a centre of this size.  A good level of public seating is available at pedestrian areas on York Avenue.

### Public Perception

5.5.32 There were 52 respondents interviewed in the street survey held in High Street, East Cowes. 30 were local residents and 22 were visitors. The findings of the shopper survey revealed that the majority of town centre users (73%) had no specific dislikes about the town centre. Some small areas of concern were raised by the other 27%, the most prominent being poor quality shops, traffic congestion.

5.5.33 Almost half of respondents (48%) were happy with their town centre and made no suggestions for improvements. The remaining 52% of respondents suggested a range of improvements, the most commonly requested included:

- Need for more need for more car parking (8%)
- A better range of shops (8%)
- Improvements to the pedestrian environment (6%)

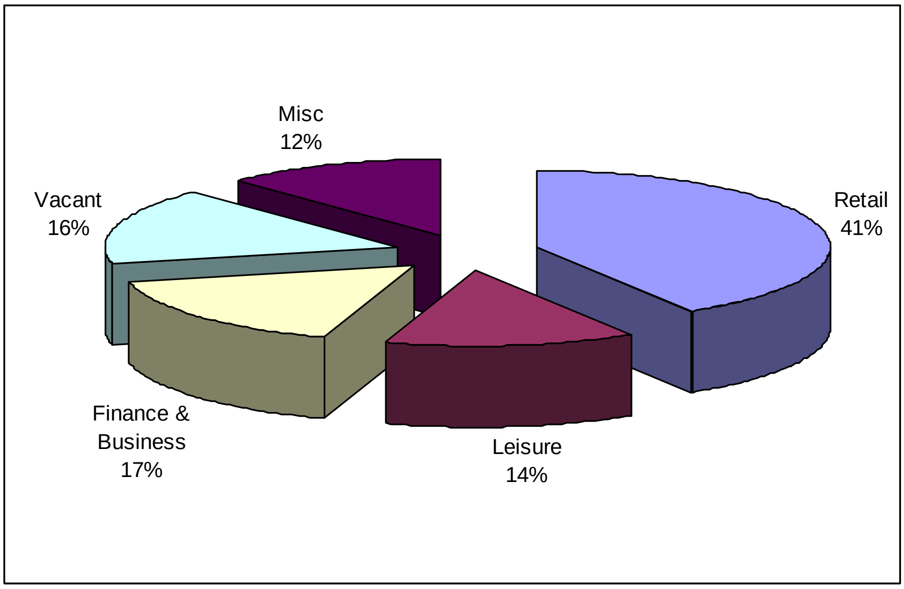
5.5.34 Visitors stated that the high quality physical environment, a perception of safety the good transport links and the mix of retail and leisure selection were what they enjoyed about East Cowes.

# 5.6 Freshwater

### Diversity of Uses

5.6.1 The town centre contains a more balanced mix of uses, albeit very limited in number, compared to other towns on the Island. Occupied retail floorspace accounts for a much lower proportion (41%) due to the high proportion of vacant retail space. Figure 5.11 illustrates the breakdown of uses by floorspace.

*Figure 5.11 - Breakdown of town centre floorspace by use, Freshwater*




*Source: GOAD and Halcrow Group Ltd 2009*

5.6.2 Table 5.5 provides a breakdown of units by use type as recorded on the day of survey and compares these results against the GOAD survey undertaken in November 2008.

*Table 5.5 – Breakdown of units by use 2008 - 2009, Freshwater*

| Use Type | 2008 | 2009 |
|---|---|---|
| Comparison Retail | 22 | 17 |
| Convenience Retail | 8 | 6 |
| Retail Service | 9 | 9 |
| Leisure | 12 | 8 |
| Finance & Business | 14 | 13 |
| Miscellaneous | 5 | 6 |
| Vacant | 6 | 12 |

*Source: GOAD and Halcrow Group Ltd*

5.6.3 The analysis shows decline in retail and leisure businesses which correlate to an increase in the number of vacant units. The likely reason being the sustained leakage of resident expenditure to other centres.

5.6.4 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Growth or Consolidation

5.6.5 The town centre of Freshwater is relatively low density with a mixture of retail and residential uses. This presents a number of opportunities should the expansion of the centre be deemed appropriate. Additional retail units could be accommodated on Avenue Road between the Memorial Hall and Belmont Cottages. This site area currently contains several offices and dwellings. Developing this area with additional retail would provide an improved frontage onto the street.

5.6.6 A further opportunity is the vacant Royal Standard Hotel at 15 School Green Road. The large building could be developed to provide a large retail unit or a mixed use development including residential.

### Retail Representation and Requirements

5.6.7 Retailers in Freshwater are predominantly local or independent businesses. Multiple retailers are represented by Sainsburys, Alliance Pharmacy and Co-op. Without a strong customer base, the centre is unlikely to attract major brands.

5.6.8 No retailer requirements are recorded for Freshwater.

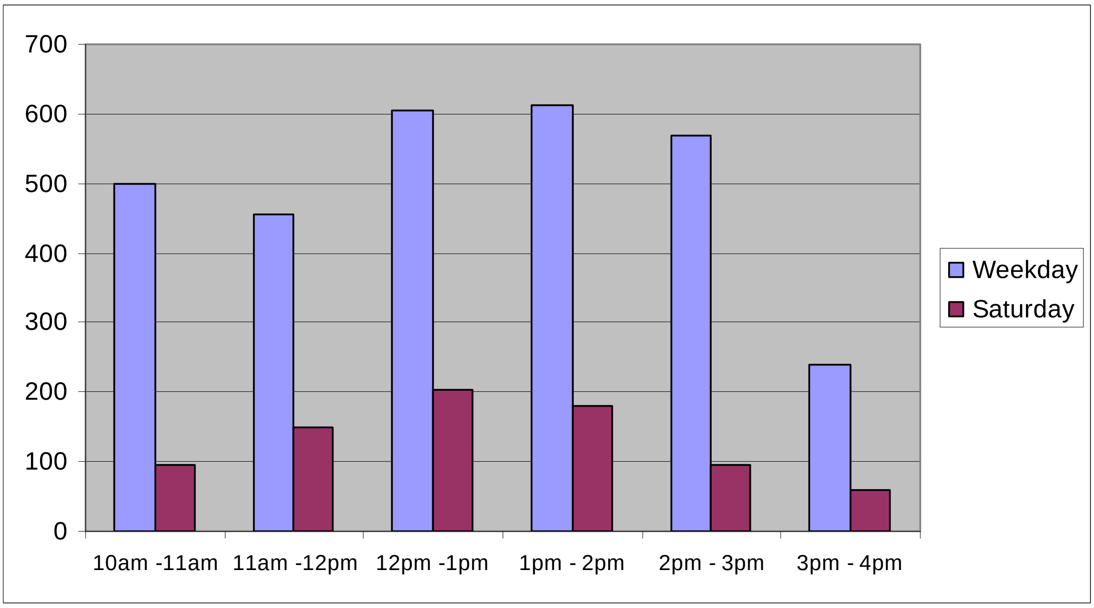
### Retail Rental and Yield Values

5.6.9 Information on rental and yield values are not available.

### Pedestrian Flows

5.6.10 Survey findings revealed that on average 497 people passed the junction of Avenue Road and School Green on the hour between 10am and 4pm on the weekday. However the figure reduced to 131 on Saturday. Peak times were recorded between 12pm and 1pm on the weekday and earlier between noon and 1pm on the Saturday.

*Figure 5.12 - Hourly footfall at High Street/School Green Road, Freshwater.*




*Source: Research & Market Plus 2009*

## Accessibility

5.6.11 In general accessibility to the centre is adequate although public transport services are limited. The town would benefit from improvements to pedestrian and cycle parking provision.

### *Traffic management*

5.6.12 Traffic management issues do not appear to be a problem in the town centre. On the day of survey there was very little traffic passing through the town centre.

### *Parking*

5.6.13 Parking provision in the town centre is largely accommodated at the towns two car parks. On-street parking is very limited and confined to one side of Avenue Road for short term use (free). A small public car park is located midway along Avenue Road for long term parking. A second and larger public car park is located on Moa Place which serves the local leisure centre. On the day of survey few on-street parking spaces were available while both long term car parks were half occupied.

### *Public Transport*

5.6.14 Freshwater relies on the local bus services for public transport access. The centre is connected to other parts of the Island by Southern Vectis buses on route 7 and route 11, serving Totland, Yarmouth and Newport including intermediate towns. No taxi ranks are present in the centre. Private hire taxis are available and serve the wider community.

*Walking and Cycling*

5.6.15 Zebra crossings are in place on Avenue Road which allows improved pedestrian connectivity between uses on each side of the street. Pedestrian safety could be improved around the junction of High Street and Avenue Road. At present there is no indication of a safe crossing point. At the very east of Avenue Road, the pavement narrows considerably at Cliff Hall Buildings.

5.6.16 On the day of survey, many cyclists were visible passing through the town centre. However, cycle facilities are limited. Cycle parking facilities were noted at the two long stay car parks. No other cycle provisions are in place.

*Disabled Access*

5.6.17 Disable access is adequate and could benefit from improved facilities for people with disabilities. Dropped kerbs are present at all key crossing points in the centre however no investment has been undertaken into textured paving which assists the visibly impaired. Many of the street pavements are poorly maintained which can hinder movement for wheelchair users and those with walking difficulties.

5.6.18 Designated parking spaces were available on Avenue Road and Tennyson Road in addition to the two public car parks. Wightbus operate a ‘dial-a-bus’ service for the elderly and disabled passengers from Freshwater and provides connections to Totland, Yarmouth and Newport. The service runs on Tuesdays only.

**Environment**

5.6.19 Overall, the quality of the environment in Freshwater is poor. There appears to have been little if no investment in the town centre for some time.

5.6.20 The worst affected area is Avenue Road largely due to the poor upkeep of buildings and shop fronts, persistent vacancies and lack of investment in public realm in particular pavements. The street architecture comprises a mix of pitched roof Victorian retail units with upper floor residences and single storey retail units. The Freshwater Design Statement[11] suggests that the single storey units were intended for temporary use only, when the railway arrived in 1888. While these

[11] Paragraph 10.5 Freshwater Design Statement (2008)

buildings may have been designed to be functional as temporary accommodation, they have not aged well over time and detract from the overall quality of streetscape[12].

*Figure 5.13 - 'Temporary' single storey retail units on Avenue Road*


5.6.21 Street furniture is poorly maintained throughout the centre with evidence of broken traffic bollards and signposts. The high levels of vacant units impacts further on the quality of the environment, particularly where longer term vacant units have not been maintained. Pavements along Avenue Road are presented as a patchwork of tar macadam and concrete slab paving.

5.6.22 The quality of the environment improves along School Green Road. Original Victorian shop frontages have been retained and upgraded sensitively. Moa Place offers an attractive green space and focal point for the centre. It is evident that businesses have invested in maintaining their shop fronts and upper floors.

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[12] Since the time of survey a number of improvements have been undertaken to shop frontages and street furniture.

*Figure 5.14 Examples of investment in shop frontages.*


5.6.23 There is evidence of a refurbishment scheme to the Victorian public toilets on Moa Place with positive effect. Investment in soft landscaping is lacking throughout the town centre and where it is present it appears neglected.

### Quality of Retail Offer

5.6.24 In general retail offer in Freshwater is very limited in range. Retail offer has been depleting over the years as evident in the growing number of vacant retail units along Avenue Road. As the main local shopping centre for West Wight, the quality of offer is very poor.

5.6.25 Retail is dispersed between Avenue Road and School Green Road. A basic range of comparison retail is present including a small choice of household electrical goods retailers, carpet and textiles retailers, chemists and specialist retailers (e.g. outdoor clothing, fishing accessories and antiques).

5.6.26 Convenience retail offer is similarly limited for centre serving the West Wight. A small Sainsburys and Co-op comprise the main convenience retail offer for the centre. A large Co-op store is located at the edge of the settlement at Hooke's Hill. A butcher and two CTN make up the remaining convenience offer.

5.6.27 Retail services offer is somewhat better if not adequate and includes a barber shop, hairdressers, beauty salon, travel agent and optician.

5.6.28 A farmers market operates in Freshwater during the summer months on the first Sunday of every month from 9am. The market takes place on the first Sunday of the month outside the Co-op Store.

### Crime and Safety

5.6.29 Consultation with Hampshire Constabulary shows that crime in Freshwater is minimal and primarily associated with anti-social behaviour at areas where youths congregate in particular the Moa Place public car park. This is reflected in crime incidence records. Recordings for anti-social behaviour are highest at School Green Road (78) and Moa Place (20).

### Public Amenities

5.6.30 The town centre provides a basic offer for public conveniences. ATMs are located at retail banks on Avenue Road. Sainsburys on School Green Road provide an ATM facility.

5.6.31 A public toilet is provided at Moa Place along with public seating which doubles as a waiting area for the adjacent bus stop.

5.6.32 Signposts are located at Moa Place and require upgrade. No information points were visible in the town centre.

### Public Perception

5.6.33 The survey in Freshwater had 41 respondents. 33 were local residents and 8 were visitors. Survey findings revealed that on average 987 people passed along the High Street on the hour between 10am and 4pm on the weekday. However

5.6.34 Just under half of the respondents stated that they had no particular dislikes about the town centre. 34% stated that they felt there was the need for a particular type of shop and 15% stated that the standard of shops on offer was poor.

5.6.35 In terms of suggesting improvements in the town centre, over 86% of respondents had issues with the level and provision of retail in the town. These issues included the need for a specific type of shop (37%), for a better range of shops (27%) and the need for more shops in general (22%). Poor leisure provision and the pedestrian environment were other factors raised in the survey.

5.6.36 Visitors interviewed in the survey stated that the safe environment was the in the best things about Freshwater town centre.

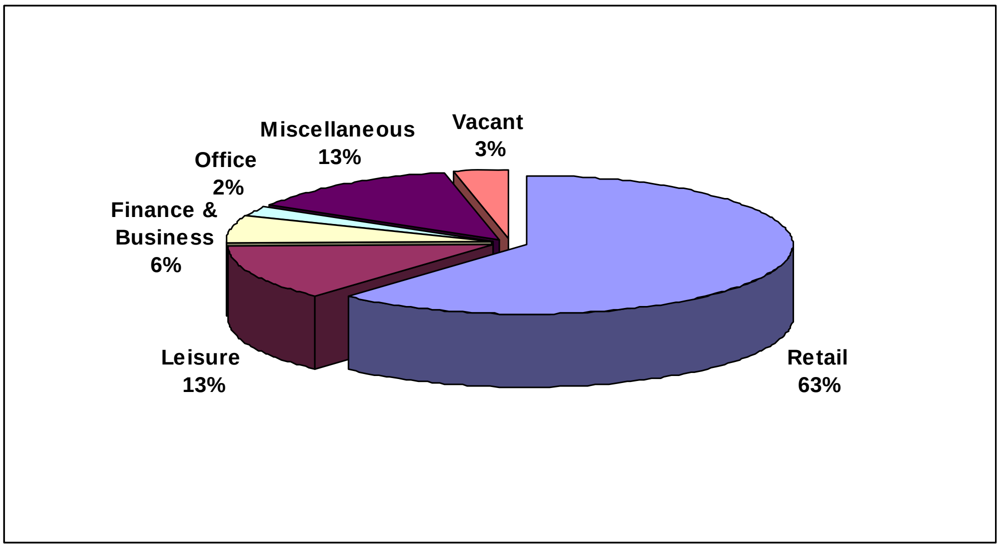
# 5.7 Newport

## Diversity of Uses

5.7.1 As the largest town on the Island, Newport offers a wide range of town centre uses ranging from retail and retail services, leisure and night time uses to business and hospitality. Uses are spread out across the town's grid structure; the High Street and St James Square attracting the more popular brands and services. Newport is supported by a network of secondary shopping streets that provide further retail and retail service offer.

5.7.2 Newport contains 103,650 sqm of ground floorspace which is occupied by town centre uses. Retail accounts for almost two thirds of floorspace reflecting the town's role as the Island's primary shopping centre.

*Figure 5.15 - Floorspace breakdown by activity, Newport*




*Source: GOAD and Halcrow Group Ltd 2009*

5.7.3 The number of occupied retail units in Newport increased marginally since the last GOAD survey in 2008 with growth, albeit by one unit, in comparison and stronger growth in the number of retail service units. Table 5.6 compares retail unit by town centre activity type since the GOAD survey.

*Table 5.6 - Diversity of Uses by Unit 2008 – 2009, Newport*

| Use | 2008 | 2009 |
|---|---|---|
| Comparison | 163 | 164 |
| Convenience | 23 | 23 |
| Retail Service | 45 | 50 |
| Leisure | 64 | 65 |
| Finance & Business | 40 | 38 |
| Office | 17 | 17 |
| Miscellaneous | 26 | 25 |
| Vacant | 37 | 33 |

*Source: GOAD and Halcrow Group Ltd*

5.7.4 Comparison retail equates to 428,600 sqm of retail floorspace and accounts for half of all retail and leisure units in the town centre. Leisure uses occupy the next largest proportion of units (65) followed by retail services (50) and convenience (22).

5.7.5 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Growth

5.7.6 The town centre of Newport is currently well developed and serves as the principle service centre on the Isle of Wight. Newport is identified within the South East Plan as a Secondary Regional Centre. The Council's Core Strategy indicates that the Council will support the development of Newport as the primary retail centre for the Island in line with the South East Plan. The town centre will therefore be the focus for retail, employment and mixed use development.

5.7.7 A number of opportunities to develop the town centre are available. At present there is an opportunity to the west of St James Street between Lugley Street and Crocker Street. This area is primarily yard space surrounded by large office and warehouse units. The space could be developed in order to provide additional retail space.

5.7.8 An opportunity to expand the town centre along Quay Street towards Sea Street and the river would provide additional retail space and possibly leisure facilities such as restaurants and cafés. Riverside sites can provide good development opportunities whilst improving the quality of town centres. The Council will support and develop proposals to regenerate the Newport Harbour Area to make best use of the employment, tourism, leisure and recreational opportunities.

5.7.9 A proposal to expand the Sainsbury's Store at Foxes Road received planning permission in 2008 which will provide an additional 1,532 sq m of retail floor space to the store.

5.7.10 In order to provide additional development at Litten Retail Park, the surface level car parks could be relocated underground to enable the land to be developed for retail uses. The large area of land that would be available could provide sufficient space for either a large retail unit much like the adjacent Marks and Spencer or alternatively a small indoor shopping precinct containing numerous retail units.

5.7.11 There may be additional opportunity to expand north of Hunnycross Way to the rear of the Sainsbury's filling station. The site can provide additional retail capacity and benefits from good transport links off the Hunnycross Way and the A3054.

5.7.12 A smaller opportunity is available at the corner of South Street and Church Litten. The site is currently occupied by a small vacant unit, but could be developed to provide additional retail space fronting onto South Street.

5.7.13 There is a large vacant unit at 36 Lugley Street with a large yard area to the rear. This site could be redeveloped to provide improved retail space or a possibly a mixed use development.

### Retailer Representation and Retailer Requirements

*Retailer Representation*

5.7.14 The town has a higher presence of multiple retailers compared to Ryde and includes brands that are familiar in larger towns and cities across the UK (e.g. Marks and Spencer, Boots, Top Shop, Birthdays, Dorothy Perkins, Edinburgh Woollen Mills, etc.). High Street and St James Square a strong customer the base the town attracts the international and national retailers.

5.7.15 Popular national retail brands such as Boots, Edinburgh Woollen Mills, Clinton Cards, Thorntons, Dorothy Perkins, etc., are concentrated in the central area of the street where it connects with Mill Street to the west and east as far as the tourist information centre. Other key retailers on High Street include BHS and HMV.

5.7.16 St James Square offers a similar product to the High Street with a number of popular multiples (e.g. Topshop, Millets, Early Learning Centre) as well as established local retailers (Fields Menswear, Capital Jewellers, etc.). The recent development at South Street has allowed existing multiple retailers to upgrade to more modern and larger premises including Next and New Look. The development has also attracted women's clothing retailer Bon Marché to the town. Typically, multiple retailers demand modern retail floorspace which appears to be lacking in the town centre.

5.7.17 Larger retail formats are accommodated at Litten Park and include Marks and Spencer and Matalan. A small retail park is located at the edge of the town centre. Town Gate Retail Park accommodates three large occupied retail units and is occupied by discount shoe retailer Brantano, Halfords and Blockbuster. A second retail park, Wakes Retail Park, is located out of centre and accommodates a range of bulky goods retailers including Pets at Home, PC World and Currys. B&Q Extra occupies large freestanding unit adjacent to the retail park on Dodnor Lane.

5.7.18 The town centre is well served by foodstore operators (convenience) through: Morrisons (South Street), Somerfield (South Street), Sainsburys (Foxes Road), and an M&S Simply Food (Litten Park). Discount food retailers are represented by Lidl (Riverway).

5.7.19 It should be noted that there is an under representation of 'luxury goods' retailing in the town centre.

*Retailer Requirements*

5.7.20 Records from FOCUS show a strong interest from key retail and leisure brands for town centre locations. Notable enquiries include TK Maxx and TJ Hughes Ltd who seek large floorplates.

*Table 5.7 - Retailer Requirements for Newport*

| From sq ft | To sq ft | Class | Retailer |
|---|---|---|---|
| 800 | 1,200 | All | Country Casuals |
| 600 | 1,500 | All | Phones 4 U |
| 3,500 | 5,000 | A3 | Frankie & Benny's |
| 3,500 | 8,000 | All | Poundland Ltd |
| 7,000 | 15,000 | All | The Original Factory Shop |
| 400 | 1,000 | A1 | Shaw Trust |
| 25,000 | 150,000 | All | TJ Hughes Ltd |
| 3,000 | 6,000 | All | British Heart Foundation Furniture/Electrical |
| 15,000 | 40,000 | All | T K Maxx |
| 3,000 | 5,000 | All | Lakeland Ltd |
| 850 | 1,500 | A1 | Holland & Barrett Retail Ltd |

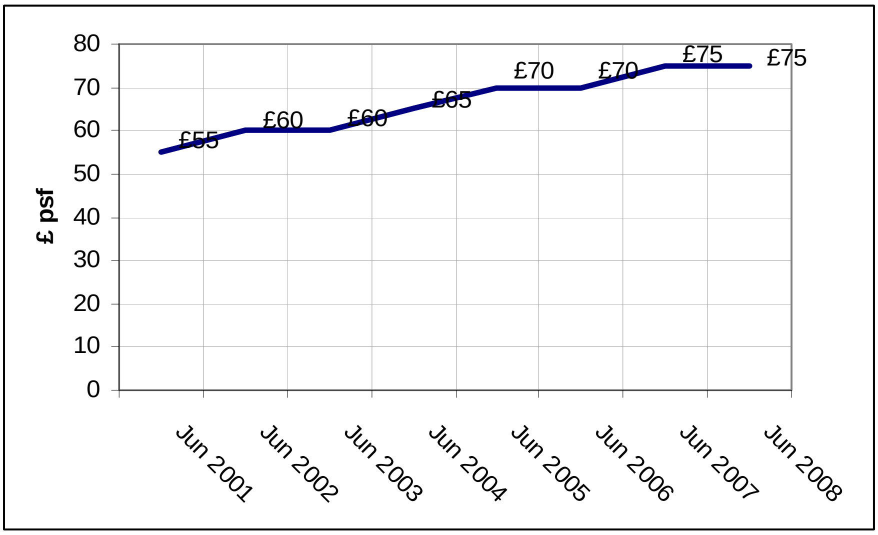
*Source: Focus 2009*

5.7.21 Since the publication of Focus retailer requirement data, Poundland has opened a store in the former Woolworths unit on High Street. Interest has also been registered by women's fashion retailer McKay's for a store in the town centre.

### Retail Rental and Yield Values

5.7.22 Rental values have increased steadily in Newport since 2001. Retail rental values reached their peak in 2007 at £75 per sq ft and remained static into 2008.

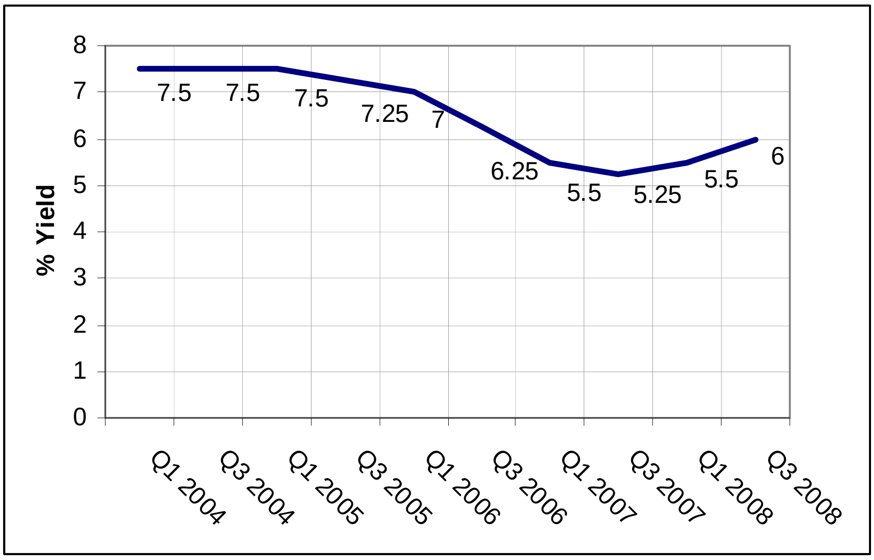
*Figure 5.16 - Retail Rental Values 2001 – 2008, Newport*




*Source: Colliers CRE*

5.7.23 Shopping Centre yield data collected by the Valuations Office shows that yields peaked at 5.5% in July 2007 (Q3) and have fallen in value to 6% in July 2008.

*Figure 5.17 - Yield Values 2001 - 2008, Newport*

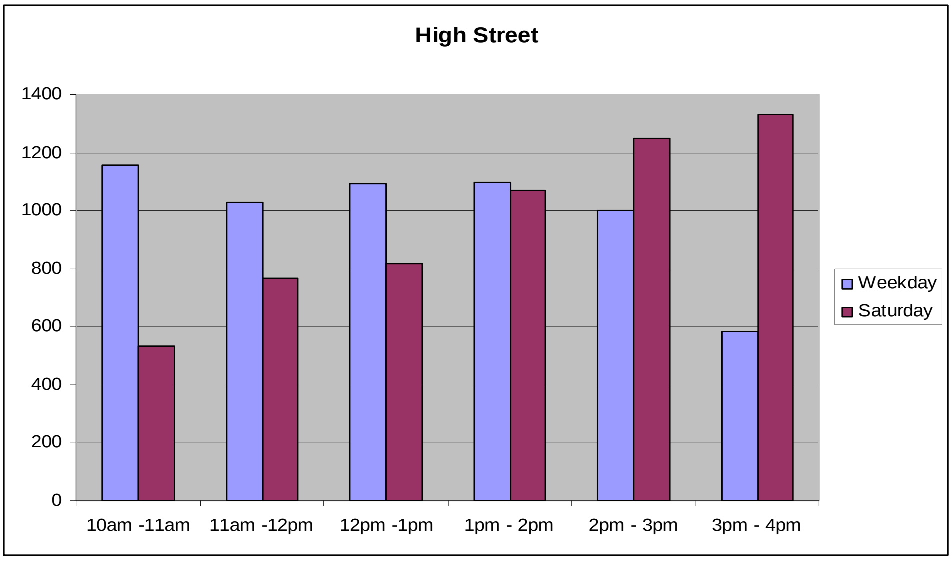



*Source: Colliers CRE*

### Pedestrian Flows

5.7.24 A footfall survey was carried out at two locations in Newport; High Street and the junction of Town Lane and South Street. Weather conditions were dry for both days of the survey, on a weekday and a Saturday. Survey findings revealed that on average 993 people passed on the hour at High Street on a weekday compared to 961 on a Saturday. Newport Market was operating on the day the mid week survey was carried out attributing to an increase in mid-week footfall. Peak times were recorded midweek between noon and 2pm and later on a Saturday between 3pm and 4pm.

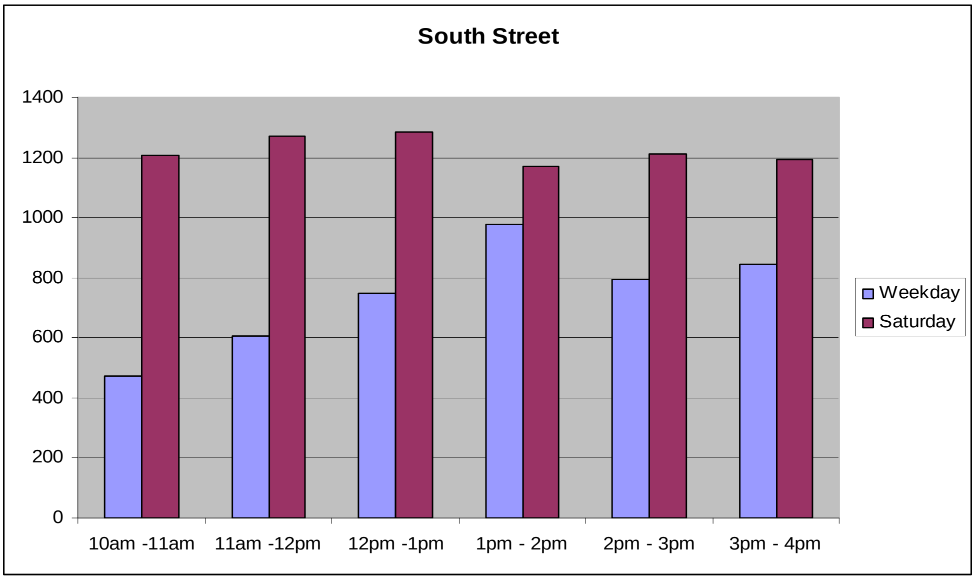
*Figure 5.18 - Pedestrian counts on High Street, Newport*




*Source: Research& Marketing Plus 2009*

5.7.25 Footfall was greater on South Street where recordings revealed an average hourly footfall rate of 1,270 mid-week between the hours of 10am to 4pm increasing to 1,223 on a Saturday. Peak times were noted between noon and 1pm midweek and between 2pm and 3pm on a Saturday.

*Figure 5.19 - Pedestrian counts on South Street, Newport*




*Source: Research & Marketing Plus 2009*

## Vacancy Rates

5.7.26 Newport contains 30 vacant Class A1 units and equates to 8.5%; below the UK average (10.24%). The number of vacant units has decreased since the last GOAD survey in 2008 where the total number was 35. Vacancies were recorded across the centre and where this occurs vacancies are low. The greatest number of vacant units were recorded on St James Street (14) and on High Street (8).

## Accessibility and Connectivity

*Traffic Management*

5.7.27 Newport operates a one-way traffic system on the majority of streets in the town centre. A number of streets operate a two way system which is restricted for buses only. High Street serves as the main thoroughfare for the centre. On the day of survey, traffic levels were constant along High Street with congestion noted even during off-peak times. Heavy traffic was recorded on peripheral arterial routes serving the town. It is anticipated that traffic management is an issue for the town centre particularly during peak times. Despite the presence of a bus station in the centre and bus lanes to promote greater access for public transport, private car traffic still remains an issue for the town centre. Measures to curb traffic in the centre may include developing park and ride stations with free bus shuttles to centre locations. The Island Plan Core Strategy supports a number of traffic management improvements for Newport. Junction improvement schemes are proposed in addition new Park and Ride facilities which would assist in alleviating congestion.

*Parking Provision*

5.7.28 Parking is provided by paid on-street parking and designated public and private car parks. Short stay car parks, albeit low capacity, are found at a number of locations within the centre including sites at South Street Library and St James Street. One long stay public car park operates in the town centre (Saturday only) at County Hall. An NCP multi-storey car park is located off South Street (207 spaces). M&S, Somerfield and Matalan provide free parking within a dedicated open surface car park at Litten Park for customers. Somerfield and Matalan customers must provide a receipt of purchase to claim free parking. On the day of survey there were few available car spaces on and off street including at Litten Park. Demand for parking at public car parks is exacerbated by resident permit holders who are exempt from parking charges[10]. As in the case for Cowes, this policy provides less incentive for residents to choose more sustainable modes of transport and creates an artificial demand for town centre parking.

*Public Transport*

5.7.29 As the main centre for the Island, Newport is very well served by the island's bus network, Southern Vectis, with 15 bus routes linking the town to all parts of the island. A bus station is located within the centre and acts as an interchange for bus routes. Bus lanes are in operation on selected streets within the centre providing priority access for passengers.

5.7.30 Taxi ranks are in operation within the centre with ranks located along South Street and High St. Anecdotal evidence suggests that ranks do not have enough capacity and that temporary ranks would be beneficial near night time economy hot spots.

*Walking and Cycling*

5.7.31 The centre offers a safe environment for pedestrians with pedestrian crossing in place on all streets which promotes pedestrian connectivity. Pedestrian zones are located at St Thomas Square and Watchbell Lane. A footpath widening scheme has been implemented at St James Square creating a safer and attractive environment for pedestrians. The centre contains a network of pedestrian laneways that link up shopping locations (e.g. Cockrams Yard, Castlehold Lane, Post Office Lane and Scarrots Lane.

5.7.32 The town centre would benefit from more pedestrian priority such using shared surfaces which forces cars to slow down and give pedestrians more sense of ownership to the street. Parts of the High Street may be suitable for pedestrianisation, in particular adjacent to St Thomas Square.

*Cycling*

5.7.33 Facilities for cyclists are in place. Cyclists are permitted to use bus lanes in the centre and designated waiting areas are found at most traffic lights within the centre. A designated cycle lane is in place through St James Square. Cycle parking facilities are well provided with parking facilities noted on along High Street, St James Square, St Thomas Square and South Street. Cycle parking is also in place at car park sites.

*Disabled Access*

5.7.34 Dropped kerbs are in place at all crossings throughout the centre. Textured paving is available along High Street, South Street and at all pedestrian crossings. Disabled parking is more than adequately provided throughout the centre. Designated on-street parking spaces are available on all streets and public car parks.

5.7.35 A ‘dial-a-bus’ service operated by Wightbus provides connections to centres across the island for the elderly and persons with disabilities. Services operate on specific days of the week to Ryde, Bembridge, Cowes, East Cowes, Sandown, Shanklin, Ventnor, Yarmouth and smaller centres along these routes.

### Quality of Town Centre Environment

5.7.36 Overall the quality of the town centre environment is adequate and varies considerably between different locations. As the principal shopping centre, improvements to building frontages and pavement upgrades should be a priority at key shopping streets.

5.7.37 Focusing on High Street first, the quality of the environment varies. The street contains a mixture of modern and heritage building types which blend together to form an attractive streetscape. The central section of High Street (between the Holyrood Street and Mill Street) offers a high quality environment. Pavement improvements are evident which has not only improved pedestrian safety but also created a more attractive shopping environment; essential for a town’s premier shopping street.

Other sections of the High Street would benefit from similar pavement improvements, particularly the eastern section of High Street.

*Figure 5.20 - Variation of pavement quality on High Street, Newport*


5.7.38 Attractive street furniture is utilised along the High Street e.g. aesthetically pleasing parking bollards (see Fig 4.15). Building and shop front maintenance on the whole is good along the street in particular where heritage buildings have been converted to modern retail use with good effect.

*Figure 5.21 - Good building maintenance on High Street, Newport*

5.7.39 However, the prevalence of vacant units and buildings along this section of the High Street has a considerable visual impact on the overall quality of the environment. Vacant units could benefit from the removal of commercial fascia signs and utilising window space for advertisement or tourist information.

*Figure 5.22 - Vacant buildings on High Street, Newport*


5.7.40 St Thomas Square presents a very high quality public space and serves as an attractive focal and meeting point for the town centre. Public realm improvements undertaken in the past have been maintained. Characteristic pavement design and soft landscaping has been incorporated around the Square with good effect. Investment is evident in the majority of buildings and shop fronts fronting the square. Unity Hall could benefit from simple improvements to its upper floors and ground floor unit frontages.

*Figure 5.23 - Good quality public realm (St Thomas Square), Newport*

5.7.41 St James Square offers a similar quality public realm with notable investment in planting improvements, street furniture and planting.

However, the overall quality of the environment is compromised by poor shop fronts, in particular modern fascia signage.

5.7.42 Recent development along South Street introduces more contemporary architecture to the town centre. A mixture of traditional and non-traditional street furniture has been incorporated (e.g. modern stainless steel bollards and traditional Victorian style street lighting). The quality of environment declines further along the street where modern building styles have become dated and were buildings have fallen into disrepair. Building restoration was noted at the public toilets with good effect.

5.7.43 Good quality street environments are presents on most of the town's secondary streets including Pyle Street, Town Lane and Lugley Street. St James Street is could benefit from improvements to pavements and upper floors.

*Figure 5.24 - Variable building quality on South Street, Newport.*


5.7.44 Newport also offers some unique shopping environments including Watchbell Lane and Scarrots Lane. The former leads from High Street onto Holyrood Street and is characterised by its narrow winding alley way and heritage buildings. Block hexagonal paving in place looks dated and could benefit from refurbishment in the long term. Scarrots Lane presents a very different but equally interesting street environment. The laneway comprises a collection of mews buildings and rear fronting buildings converted into retail uses. There is good evidence of shop front investment while gap sites present the opportunity for development or upgrade.

*Figure 5.25 - Watchbell Lane (l) and Scarrots Lane (r), Newport*


5.7.45 Most of the centre's other secondary streets offer reasonably good shopping environments, particularly Town Lane where there is evidence of recent street improvements and good building maintenance. St James Street could benefit from pavement improvements and the upgrade of vacant buildings.

### Quality of Retail Offer

5.7.46 Overall, the quality of retail offer is typical for a town centre of this size but for a regional centre it should be attracting more quality comparison retailers. While the centre boasts many multiple retailers, it needs to improve and broaden its offer in order to stem the flow shoppers to Southampton and other mainland centres. The town centre contains a good range and quality of convenience retail and retail services. Better quality retail offer is focused at prime retail locations within the town, namely, central High Street and St James Square. However, the High Street and the town centre in general lack high quality fashion retail brands.

5.7.47 Retail offer on the High Street includes a typical range of comparison retailers found in most centre high streets including fashion, shoes and accessories, phones, books, houseware, newsagents, computer games and chocolatier.

5.7.48 A good range and quality of convenience retail is provided including. A large Sainsburys store is located at the edge of the town centre. Discount retailer Lidl is also present and located at Riverway.

5.7.49 Two markets operate at St Thomas's Square every week. A general retail market takes place on a Tuesday selling general goods. A farmers market operates on a Friday between 9am and 2pm and sells local produce. Stall holders include local farmers, fishermen, producers and bakers.

### Crime and Safety

5.7.50 CCTV is in operation through the town centre. Newport was one of the first centres on the island to have CCTV installed and cameras are located throughout the centre. Newport Police Station is located on the High Street.

5.7.51 Consultation with Hampshire Constabulary highlight areas were crime and antisocial behaviour can compromise the safety of some areas. Most incidences of antisocial behaviour occurred during the evening time and are concentrated where large groups congregate. Areas in particular include the bus station and east of the High Street where many evening time businesses operate. Recordings of crime incidences reveal a particularly high number of crime incidences on High Street (471) mainly attributed to number of locations which anti-social behaviour, shop theft and violence against a person. Other incident hotspots include the following locations:

- Orchard Street (206) - most common cause is anti-social behaviour and violence against a person.
- South Street (194) - most common cause is shop theft, anti-social behaviour and violence against a person.
- St James Street (125) - most common cause is anti-social behaviour, violence against a person and shop theft.
- Pyle Street (111) - most common cause is anti-social behaviour, violence against a person and shop theft.

### Public Amenities

5.7.52 The town centre offers an appropriate level of public conveniences which is expected for a primary centre. Directions for key locations and information boards are provided at gateway points (Litten Park) and focal points at key locations (St James Square and Thomas Square). Public toilets are located at two locations; South Street and Post Office Lane (off High Street).

5.7.53 ATM machines are provided at all retail banks and at larger supermarkets in the centre. Lloyds TSB Banks offers a cluster of ATM on St Thomas Square which also caters for disabled needs.

5.7.54 Seating areas are in good supply at pedestrian areas in particular St Thomas Square and St James Square.

5.7.55 As the primary centre for the Island, Newport would benefit from a shop mobility scheme which is widely in use in key UK shopping centres.

**Public Perception**

5.7.56 A street survey was carried out on High Street and at Litten Park. Key findings for each location are identified separately:

*High Street*

5.7.57 50 respondents were interviewed in the street survey in Newport town centre. 30 were local residents and 20 were visitors.

5.7.58 There was a general consensus amongst the respondents that the town centre was working well, with over half the people interviewed stating they had no significant dislikes. Issues relating to traffic congestion (20%) and street cleanliness (6%) were raised by some of the interviewees as the most pertinent issues to resolve.

5.7.59 44% of respondents stated that they had no suggestions for improvements in the town centre with the most significant improvement suggested being the removal of the one way system to ease traffic congestion.

5.7.60 Visitors stated that the selection and quality of shops, cafes and restaurants, the ambience and the cleanliness were the main things they enjoyed in Newport town centre.

*Litten Park*

5.7.61 There were 51 respondents whom were interviewed in the street survey at Litten Park. 31 were local residents and 20 were visitors.

5.7.62 Again the general consensus was that Litten Park works well with 55 % of respondents stating they didn't have any dislikes. A lack of car parking and traffic congestion were identified by 30% of respondents as problem issues.

5.7.63 Nearly half the respondents at Litten Park suggested that there was no real areas of improvement they could suggest. The most significant issues raised were the need to improve public transport services in general (16%) and provide more car parking facilities (18%).

5.7.64 Over half the respondents at Litten Park stated that they would use other services in the town centre as part of their visit to Newport. The main reasons given for their choice of Litten Park over the town centre included the convenience of accessibility (37%), better range of shops (24%) and availability of free parking (12%).

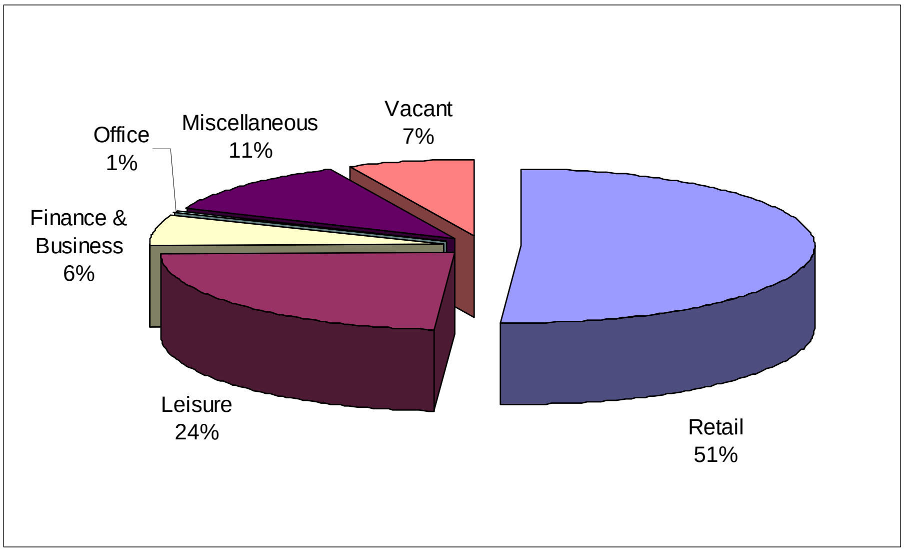
5.7.65 Visitors stated that the selection and quality of shops, cafes and restaurants, the safe shopping environment and the mix of retail and leisure provision were what they enjoyed about Litten Park.

# 5.8 Ryde

## Diversity of Uses

5.8.1 As the second largest town on the Island, Ryde offers a comparable range of services to Newport. Total town centre ground floor floorspace is 53,340 sqm, of which half (27,250 sqm) is used for retail and retail service uses. Leisure uses account for the next greatest proportion of floorspace.

*Figure 5.26 – Breakdown of floorspace by use, Ryde*




*Source: GOAD and Halcrow Group Ltd 2009*

5.8.2 Comparison retail takes up the biggest share of town centre units totalling 128. Since the last GOAD survey in 2008 the number of convenience retail and leisure units increased as outlined in Table 4.8.

*Table 5.8 - Diversity of uses, Ryde*

| Use | 2008 | 2009 |
|---|---|---|
| Comparison Retail | 128 | 128 |
| Convenience Retail | 16 | 18 |
| Retail Service | 38 | 40 |
| Leisure | 58 | 62 |
| Finance & Business | 27 | 24 |
| Office | 3 | 3 |
| Miscellaneous | 22 | 22 |
| Vacant | 37 | 31 |

*Source: GOAD and Halcrow Group Ltd*

5.8.3 Residences also make up the composition of town centre uses in Ryde at street level and on upper floors.

5.8.4 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Growth or Consolidation

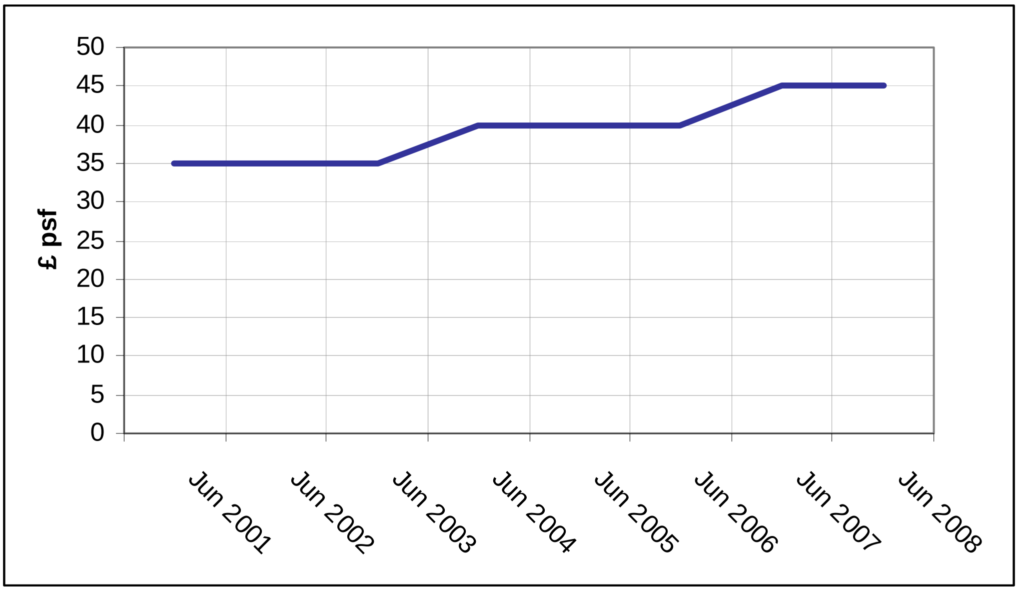
5.8.5 The town centre of Ryde follows a principally linear form stretching from the Esplanade and along Union Street and High Street. There is also a small pedestrianised area along the High Street. Much of the High Street is already well developed with limited opportunities for any infill development. There are, however several opportunities where expansion of the town centre can be accommodated. One possible area where retail development could be encouraged is that of George Street between Castle Street and Cross Street.

5.8.6 Expansion and development along the Esplanade would significantly improve the beach frontage of the town centre. A number of the units could be rebuilt to provide improved retail space or other mixed use development.

### Rental and Yield Values

5.8.7 Retail rental values for Ryde show a steady increase from £35 psf in June 2001 upwards to £45 psf in June 2007 and remained stable at this value into 2008.

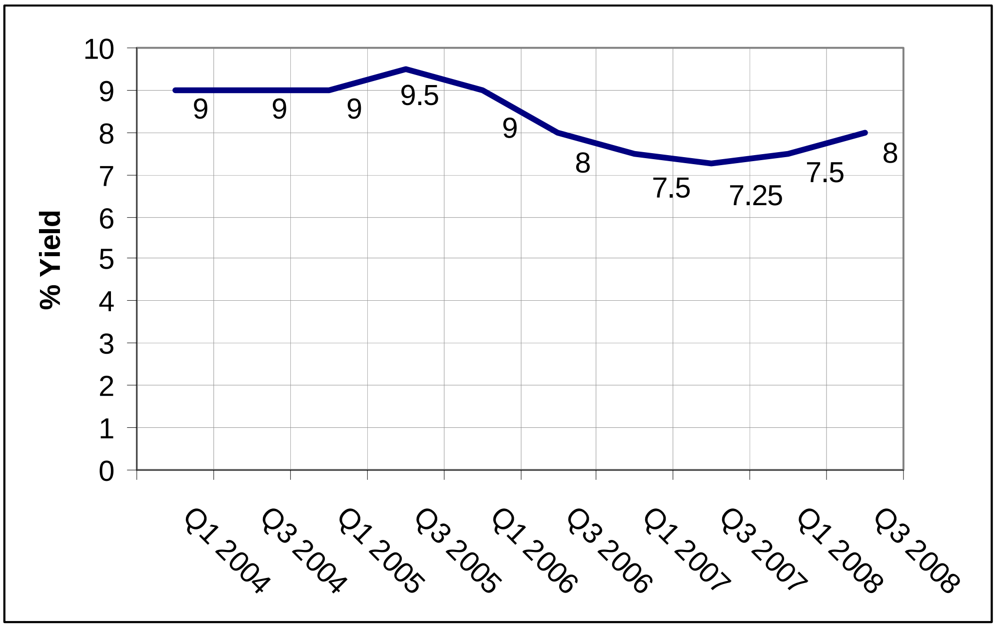
*Figure 5.27 - Retail Rental Values 2001 - 2008, Ryde*




*Source: Colliers CRE*

5.8.8 Shopping Centre yield data collected by the Valuations Office shows that yields peaked at 7.25% in July 2007 (Q3) and have fallen in value to 8% in July 2008.

*Figure 5.28 - Retail Yield Values 2001 – 2008, Ryde*




*Source: Colliers CRE*

## Retailer Representation and Retailer Requirements

*Retailer Representation*

5.8.9 Retail in Ryde is mostly represented by local independent retailers. Multiple retailers are confined to the pedestrian precinct and are limited in number. The major mixed goods retailers present include Boots the Chemist, WH Smith and Superdrug. Major fashion retailers are particularly under represented and are limited to New Look and Peacocks.

5.8.10 Other multiple retailers include Thorntons, Birthdays, Specsaver, Carphone Warehouse and Edinburgh Woollen Mills.

5.8.11 Convenience retailers in the town centre are limited to Somerfield and discount frozen food retailer, Farmfoods. A Tesco superstore is located out of town.

*Retailer Requirements*

5.8.12 Ryde has attracted interest from three multiple retailers including home finance retailer Brighthouse and clothing retailer The Original Factory Shop and Poundland the discount retail chain.

*Table 5.9 - Retailer Requirements, Ryde*

| From sq ft | To sq ft | Class | Retailer |
|---|---|---|---|
| 2,250 | 3,500 | All | Brighthouse |
| 7,000 | 15,000 | All | The Original Factory Shop |
| 3,500 | 8,000 | All | Poundland Ltd |

*Source: FOCUS*

**Vacancy Rates**

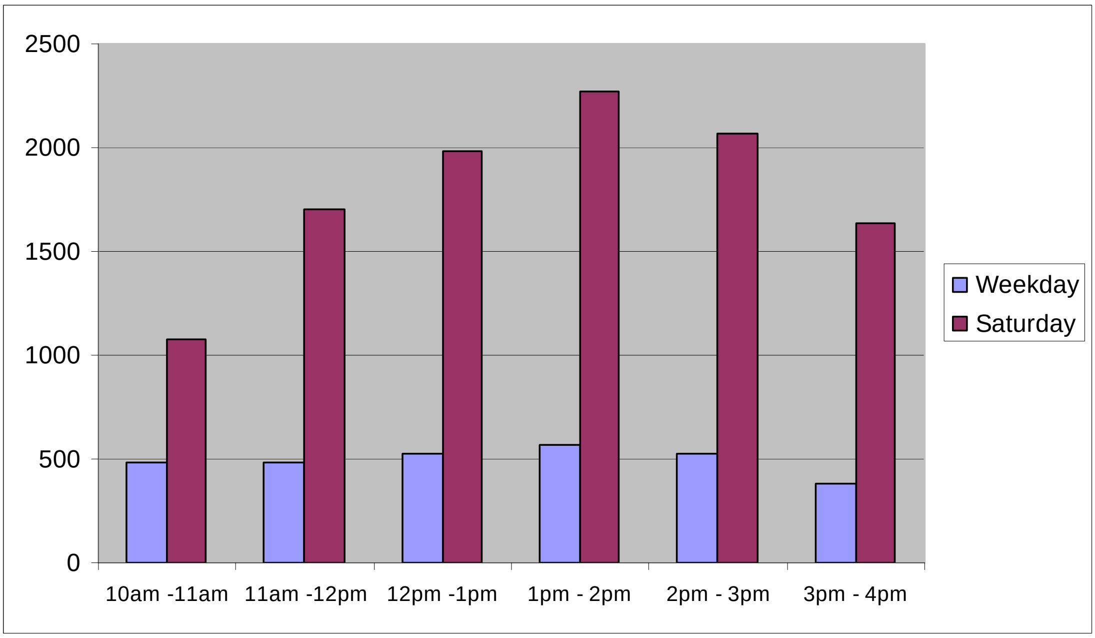
5.8.13 GOAD recorded 37 vacant units in 2008. The on-street assessment recorded 31 indicating an increase in retail activity for the town centre. Ryde has vacancy rate of 10.13%, just below the UK average (10.24%).

5.8.14 Vacancies are particularly severe on High Street were 18 vacant units were recorded. Union Street followed with 4 vacancies. A smaller number of vacant units were recorded on Castle Street (3), the Esplanade (3), Cross Street (2) and St John's Road (1).

**Footfall**

5.8.15 A footfall survey was carried out on Union Street on a weekday and a Saturday. Weather conditions varied for both days with wet weather on the weekday and dry weather on the Saturday. Wet weather impacts on the number of people visiting a town centre and as a result differences in footfall levels are significant for both days of the survey. Survey findings revealed that on average of 423 people per hour passed along Union Street between 10am and 4pm on the weekday. The figure more than trebled to 1,790 on the Saturday. Peak times were recorded between 1pm and 2pm were counters recorded 564 and 2,274 for the weekday and Saturday respectively.

*Figure 5.29 - Hourly footfall for High Street, Ryde*




*Source: Research & Market Plus 2009*

## Accessibility

*Traffic Management*

5.8.16 Ryde operates a one-way traffic system on most streets in the town centre. On the day of survey traffic flowed freely and increased to congested levels at peak times notably on Union Street and Cross Street.

*Parking Provision*

5.8.17 On and off street parking is available to town centre users. Free short term parking provided on most streets with exception for part of High Street and Cross Street. On the day of survey available on-street parking was limited. Long term parking is available at a network of public car parks (charge) on Green Street, Lind Place, St Thomas Street and Quay Road, however capacity for spaces are low at each. Long stay charged parking is also provided on-street along the Esplanade. Park and ride facilities at Ryde St John's station provide additional long-stay parking for town centre users. Resident parking policy clearly impacts on the availability of parking for the town centre. Consultation with Isle of Wight Council Highways Department suggests demand for public car parking spaces are affected by this policy which allows permit holders to park for 'free'[10]. As highlighted in para 5.7.28, this creates an artificial demand for spaces and encourages car travel.

*Public Transport*

5.8.18 Ryde is extremely well served by public transport benefiting from rail and bus connections. The rail and bus station are conveniently located adjacent to the ferry terminal on the Esplanade, immediately south of Union Street. Rail services are linked to ferry crossings and provide daily and frequent services (twice within the hour) to the towns of Sandown, Shanklin, Lake and Brading.

5.8.19 Southern Vectis operates services from Ryde to locations across the Island including Newport, East Cowes, Sandown, Shanklin, Ventnor and Bembridge. Services terminate at the bus station and bus nodes are located across the town centre.

5.8.20 Ryde is connected to the mainland via a passenger ferry service to Portsmouth. Wightlink offer a frequent (twice an hour) high speed service all year round (except 25$^{th}$ December).

*Disabled Access*

5.8.21 Dropped kerbs are in place at all crossings throughout the centre. Disabled parking spaces are provided at public car parks and a small number of on-street parking spaces. On-street spaces are provided at streets adjacent to the pedestrian precinct on High Street. Spaces were not visible on Union Street however. A ‘dial-a-bus’ service operated by Wightbus provides connections to Newport via Wootton and East Cowes for the elderly and persons with disabilities. The service runs on Mondays only.

### Quality of Town Centre Environment

5.8.22 Ryde is characterised by its impressive seafront and Victorian heritage and architecture. The town boasts attractive streetscapes in particular High Street and Union Street with its views to the sea front. There is strong evidence where businesses have invested in their appearance by adopting high quality shop frontages and should be encouraged.

*Figure 5.30 - Example of quality frontages on Union Street, Ryde.*


5.8.23 At the same time there are many examples of where improvements to building frontages on the High Street and Union St would be beneficial particularly above street level. Lack of building maintenance is evident on many upper floors and undermines improvements at ground floor.

*Figure 5.31- Under utilised upper floors on Union Street and High Street, Ryde*

5.8.24 The on-street survey noted evidence of improvements to the street environment including public realm improvements to St Thomas Square which created an attractive meeting point for the town centre. Pavement widening schemes on the Esplanade has allowed an outdoor café environment to thrive.

*Figure 5.32 - Examples of public realm improvements in Ryde*

5.8.25 The pedestrian precinct on High Street provides a safe environment for shoppers the public realm is dated and in need of modernisation and should compliment improvements undertaken at St Thomas's Square.

5.8.26 The only evidence of poor litter management in the town centre was along the pedestrian precinct. However, on the whole the management of litter is good.

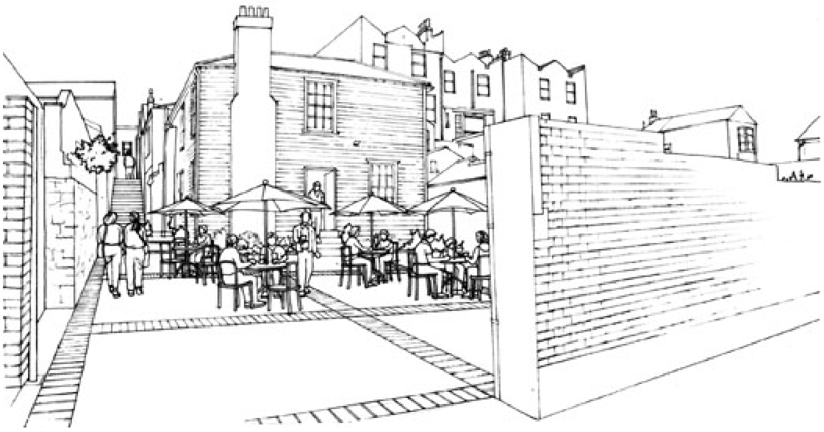
5.8.27 The Victorian Arcade on Union Street is an architectural asset for the town. The interior boasts an impressive stained glass portico and a novel shopping environment. The arcade is earmarked for extensive restoration works under Ryde Townscape Heritage Initiative (THI) which on completion will boost the attractiveness of Union Street.

*Figure 5.33 - Exterior and interior view of the Royal Victoria Arcade, Ryde*


5.8.28 Soft landscaping is visible throughout the town centre; hanging flower baskets and plant boxes are well maintained and present on every street. A landscaping scheme was carried out recently on St Thomas's Church Yard that has created a green oasis within the heart of the town.

5.8.29 Ryde is proactive in its aspiration for public realm improvement as evident in the Council's Public Realm Strategy and Ryde Townscape Heritage Initiative (THI). The Strategy proposes a range of physical improvements to four priority areas: High Street, Upper High Street, Union Street Courtyards and Eastern Gardens and the Esplanade. The Strategy will go some way to addressing a number of environmental issues raised by this assessment (e.g. upgrade of the pedestrian precinct). To date a number of the schemes have been completed including St Thomas's Square (funded through the THI) and St Thomas' Churchyard. Proposals for the rear of Union Street Courtyards are currently at design stage and will see improved links between Union Street and Union Road.

*Figure 5.34 - Proposals for the Rear Courts of Union Street*



5.8.30 Building improvements to heritage buildings will be undertaken through Ryde THI. The scheme seeks to promote an attractive environment for business development by upgrading the appearance and condition of the town's building stock particularly in commercial areas such as Union Street and High Street. Funding was recently secured for extensive repairs and restoration of the Victorian Arcade and further funding has been allocated for buildings on High Street and Cross Street.

### Quality of Retail Offer

5.8.31 Ryde offers a broad range of retail type and quality with a good mix of multiples and local retailers. The type of retail offer is easily defined by location within the town. The pedestrian zone on High Street serves as the main shopping precinct where the majority of key brand names are located. South of High Street beyond the pedestrian zone retail offer is dominated by specialist retailers (e.g. books, fancy dress, computers, cycles) and retail services. Union Street offers further comparison retail and serves as the primary location for leisure uses namely cafes, restaurants, public houses and a hotel. Secondary streets such as Lind Street and Cross Street offer a range of retail services mostly retail service and niche comparison and convenience retailers.

5.8.32 The Island Food and Craft Association (IFCA) operate a farmers market at Ryde Town Square every Saturday from 8.30am to 12.30pm. Stallholders include local food producers and Island made produce.

### Crime and Public Safety

5.8.33 Pedestrian crossings are in place to ensure pedestrian safety. Safety further enhanced through the adoption of a pedestrian zone on High Street. Residential uses on Union St (upper floors) promote a more vibrant town centre which contributes to safety. CCTV is in operation in the town centre which further enhances safety by deterring crime.

5.8.34 Night time uses on Union Street have attracted antisocial behaviour and public disorder, mostly related to alcohol. Taxi ranks could be located closer to Union Street to encourage dispersal of patrons at closing time.

5.8.35 Statistics on crime incidences provided by Hampshire Constabulary highlight a number of areas that attract crime and anti-social behaviour. Recordings for the number of reported incidences are highest along the esplanade (275) where youths tend to congregate. Other hotspots include Union Street (255), George Street (135) and High Street (116) where the most common incidences are anti-social behaviour and violence against a person.

### Public Amenities

5.8.36 Ryde offers a good range of public conveniences. Public toilets are located on the Esplanade and Lind Street. ATMs are present on High Street and Union Street at supermarket (Somerfield) and all retail banks. Signs are present at key access points in the town centre (e.g. public car parks and train station) in addition information points for tourists.

5.8.37 A shop mobility scheme is not in place in the town centre.

### Public Perception

5.8.38 100 respondents were interviewed in the street survey of Union Street, Ryde. 59 were local residents and 41 were visitors.

5.8.39 A large majority (71%) of the respondents stated that there was nothing they disliked about the town centre. Small issues with regards street cleanliness, inadequate car park provision and the general shabby appearance of the town centre were raised by 1 or 2 individuals.

5.8.40 61% of respondents stated that they had no suggestions for improvements to the town centre. 7% stated that the town centre needed a better range of shops and 4% suggested that reducing retail rates would make the centre work better.

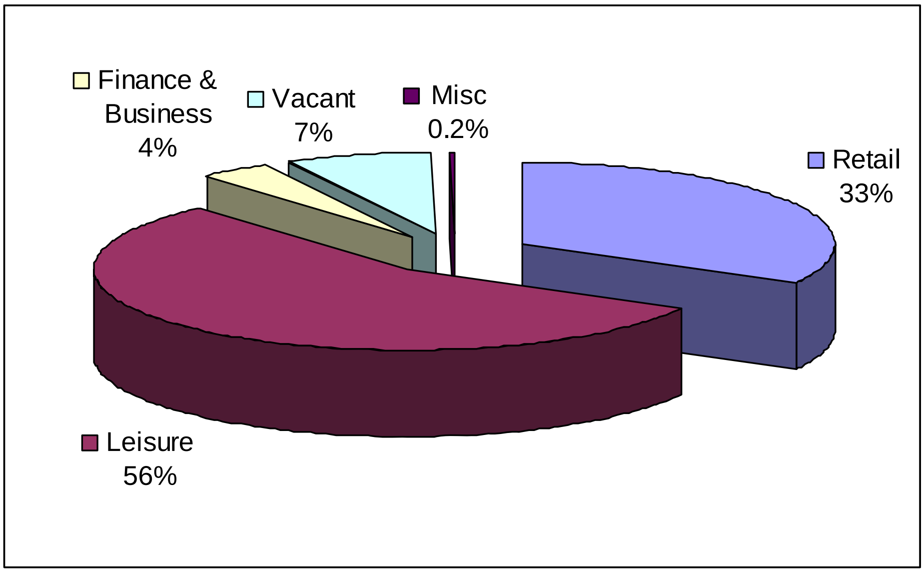
5.8.41 Visitors stated that the attractive physical environment, the selection and quality of shops, cafes and restaurants and cleanliness of the streets were the main points they enjoyed about Ryde town centre.

# 5.9 Sandown

## Diversity of Uses

5.9.1 Much of the towns uses are directed towards the tourist market resulting in a particularly high proportion of leisure activity. Leisure floorspace is mostly attributed to the many hotels and restaurants within the town centre as well as the entertainment facilities on Sandown Pier. Figure 5.35 illustrates the breakdown of town centre floorspace by activity.

*Figure 5.35 – Floorspace breakdown by town centre use, Sandown*




*Source: GOAD and Halcrow Group Ltd (year?)*

5.9.2 Since the last GOAD survey in 2008, the number and diversity of units has remained largely unchanged as outlined in Table 4.10. Convenience retail, retail service and leisure uses has seen a marginal increase in units (1) while the number of leisure units has reduced (4).

*Figure 5.10 – Floorspace breakdown by town centre use, Sandown*

| Use | 2008 | 2009 |
|---|---|---|
| Comparison Retail | 44 | 44 |
| Convenience Retail | 8 | 9 |
| Retail Service | 9 | 10 |
| Leisure | 40 | 36 |
| Finance & Business | 7 | 7 |
| Miscellaneous | 1 | 1 |
| Vacant | 6 | 7 |

*Source: GOAD and Halcrow Group Ltd*

5.9.3 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Growth or Consolidation

5.9.4 Sandown's town centre primarily runs along the sea front with a number of large hotels being situated between the High Street and Esplanade. At the east of the High Street on Culver Parade and Avenue Road are two vacant hotels which offer the potential for redevelopment and expansion of the town centre. The buildings in their current form will be best suited as Hotel accommodation but their demolition will provide large areas of development land.

5.9.5 The Core Strategy indicates that the council will aim to improve and enhance the Sandown Esplanade area including Culver Parade to provide a range of tourist accommodation facilities within the town.

5.9.6 A further opportunity presents itself at the corner of Esplanade Road and the High Street. The site is currently partially occupied by a car park for the Ocean Hotel. However, by developing a small piece of the car parking area could provide additional retail space on the High Street and significantly improve the frontage.

### Retailer Representation and Retailer Requirements

*Retailer Representation*

5.9.7 Retail in Sandown is predominantly represented by local and independent retailers. Multiple retailer representation is limited to Boots the Chemist and Sainsburys.

5.9.8 Low multiple retailer representation is expected for smaller towns. However it is also indicative of a lack of interest from larger multiples from locating to the centre. The arrival of Sainsburys, a quality retail brand, may attract interest from other multiples.

*Retailer Requirements*

5.9.9 No retailer requirements are recorded for Sandown.

### Retail Rental Values and Yields

5.9.10 Not available.

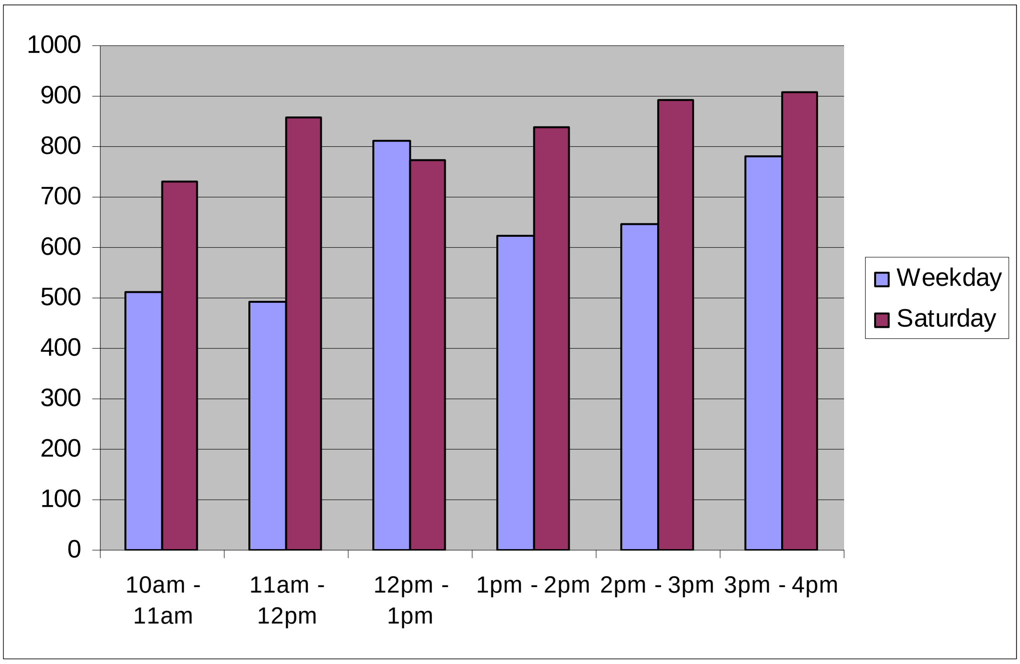
### Vacant Units

5.9.11 An on-street survey recorded 7 vacant retail and service units in the town centre (includes one vacant hotel) and reduced from 8 units as recorded by GOAD for 2008. The number of vacant units is considerably less than other centres on the island which suggests that retail and service activity is relatively strong in Sandown. The vacancy rate equates to 6%, considerably less than the average for the UK (10.24%).

### Footfall

5.9.12 A footfall survey was carried out on High Street and monitored passing pedestrians hourly between the hours of 10am and 4pm on a weekday and a Saturday. Weather conditions for both days were good. The survey revealed that on average 644 pedestrians passed along the street per hour on a weekday increasing to 834 on a Saturday. Peak times were recorded between noon and 1pm on a weekday and slightly later on a Saturday between 1pm and 2pm.

*Figure 5.36 – Pedestrian counts on High Street, Sandown*




*Source: Research & Marketing Plus 2009.*

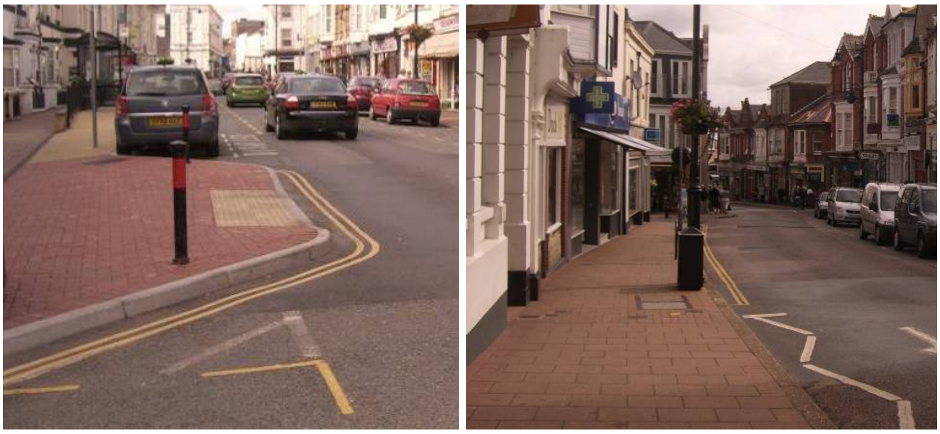
### Quality of Environment

5.9.13 In general, the quality of the environment is very poor for Sandown. In particular the quality of street frontages along the northern section of High Street is very poor and it is clear that investment and building maintenance has been lacking for some time. Hotels which back onto the High Street provide a major eyesore particularly as this is a gateway location. On the other side of the road, shop fronts appear neglected and convey a run down appearance which adds to the overall degradation of the environment. Ad hoc extensions litter the High Street and the visibility of satellite dishes on upper floors is intrusive on the streetscape.

*Figure 5.36 - Poor quality building frontages on High Street, Sandown*

5.9.14 The quality of the environment improves further south of High Street where businesses have invested in their shop frontages. Soft landscaping is utilised along the High Street with varying effect. Box plants to the north of the High Street appear poorly maintained. The Esplanade promotes an attractive environment. Pavement and road upgrades are evident and the use of flower baskets and good quality of street furniture creates an attractive open space for visitors.

*Figure 5.37 - Pavement improvement on High Street, Sandown*



### Quality of Retail Offer

5.9.15 The quality of retail offer in Sandown is poor and while it may appeal to the tourist population, the quality and range of retail is unlikely to meet the needs of the local population. Retail is largely confined to High Street where it is scattered amongst leisure and service uses.

5.9.16 The range of comparison retail limited and tourist focused mainly clothing retailers and gift shops. The town contains a number of general goods stores including a department store however these shops lack modernity particularly in the absence of quality multiple retailers with exception for Boots the Chemist.

5.9.17 Convenience retail has been boosted by the recent opening of a Sainsburys store in the former Woolworths unit on High Street. A Somerfield store is also located on the High Street. Additional convenience offer is supported by traditional convenience retailers including a butcher, bakery and CTNs.

5.9.18 The range of retail services are poor compared to other centres on the Island and mainly comprise hair and beauty related services.

**Accessibility**

5.9.19 Overall accessibility for Sandown is considered adequate for a town of this size. The main issue for accessibility lies in traffic management and parking.

*Traffic Management*

5.9.20 Traffic management was noted as a key issue on the day survey. Heavy traffic on Broadway restricted access to and from the arterial routes connecting the town centre. Within the town centre a one-way system is in operation and on the day of survey traffic was flowing freely.

*Parking*

5.9.21 Parking provision is another key issue for the town centre. Free short stay parking is available on-street, however, it is limited and on the day of survey all spaces were occupied (including disabled parking spaces). The town centre lacks an adequately sized car park and as a result there is increased demand for on-street parking. Long stay car parks are located outside the centre at Fort Street which serves the adjacent leisure centre but an undesirable distance for town centre users. Demand for parking is exacerbated by resident permit parking policy[10]. As permit holders are exempt from paying car park charges it encourages private car travel and in turn demand for public car park spaces.

*Public Transport*

5.9.22 The town is served by Islandline (railway) and connects Sandown to centres to the south and north of the coast including Shanklin, Lake, Brading and Ryde. The railway station is location outside the town centre, north of Station Avenue; approximately 15 minutes walk from the High Street. The Island bus network (Southern Vectis) provides daily and frequent services to other centres including Ryde (via Shanklin), Newport, Bembridge and Ventnor. A taxi rank is located mid-way along High Street. A second taxi rank is located a short distance from the main streets on Culver Parade.

*Walking and Cycling*

5.9.23 Pedestrian access is adequate for the town centre. Pedestrian crossings are located at key transport intersections. A pedestrian crossing appears to have been installed recently midway on High Street. Zebra crossings are in place at each end of the High Street.

5.9.24 There appeared to be a lack of cycling provision in the town centre. On the day of survey, cycle parks were not visible. No other provision such as cycle lanes or information on cycle routes was noted.

*Disabled Access*

5.9.25 Disabled access is promoted well throughout the town centre. Dropped kerbs are present at all pedestrian crossing points and textured paving has been introduced at key road intersections. Designated parking spaces are provided at regular intervals along the High Street and on all other streets. It was noted that the majority of designated spaces were occupied which either suggests that more spaces are required for disabled persons or that spaces are being occupied illicitly.

5.9.26 A ‘dial-a-bus’ service operated by Wightbus provides connections to Newport and Bembridge via St Helens and Shanklin for the elderly and persons with disabilities. The service runs on Thursdays only.

**Crime and Safety**

5.9.27 Pedestrian crossing located along High Street and the Esplanade promotes pedestrian safety. Speed restrictions of 20 mph along the Esplanade ensure a safer environment for pedestrians and motorists.

5.9.28 Consultation with Hampshire Constabulary (HC) suggested the main problem for the Sandown is the prevalence of anti-social behaviour. Incidences are largely confined to the Pier and generated from night time uses in the location. Statistics provided by HC show that reported incidences are greatest on High Street (148) and mainly due to anti-social behaviour, shop theft and violence against a person. Other hotspots include Culver Parade (98) and Avenue Road where anti-social behaviour, shop theft and violence against a person is widely reported.

**Public Amenities**

5.9.29 The town offers a good range of public conveniences. Public toilets are provided at each end of the Esplanade with further facilities located on

George Street. ATMs are located mid-way along High Street at Sainsburys and where retail banks are located. Signs and information points are located at gateway points to the centre with further directions interspersed along the High Street for key public services and conveniences.

### Public Perception

5.9.30 There were 40 respondents interviewed in the street survey held in Sandown. 24 were local residents and 16 were visitors.

5.9.31 There were a number of issues which respondents identified as dislikes in the town centre. These included poor quality shops, a lack of a particular type of shop, empty shops, traffic congestion and inadequate car parking provision. 25% of respondents stated that they had no particular issue with the town centre.

5.9.32 A range of town centre improvements were suggested in the survey. These included the provision of more car parking space, the provision of a better range of shops, the pedestrianisation of a town centre street and general refurbishment of buildings and streetscape.

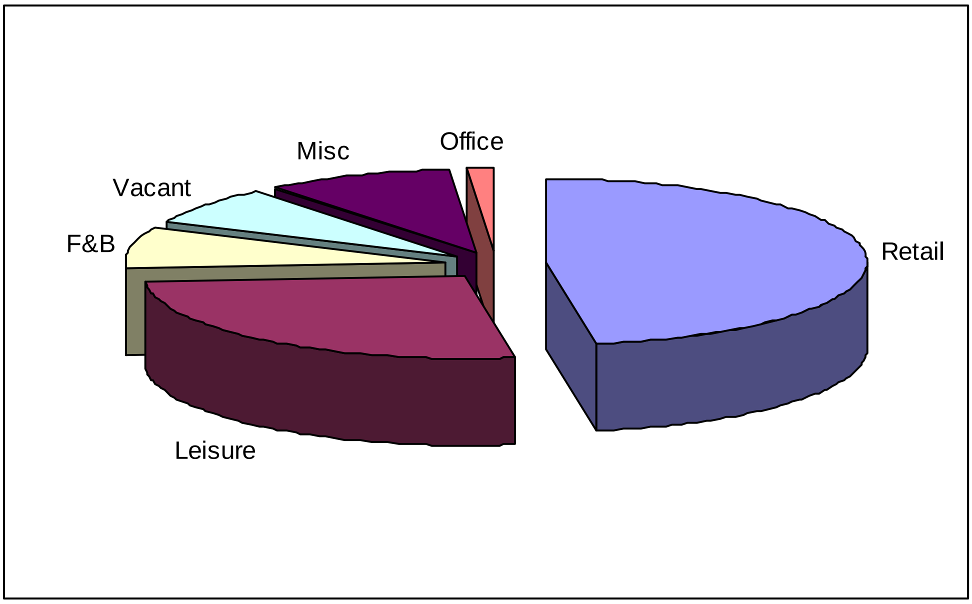
5.9.33 The 8 visitors interviewed rated the range of cafes and restaurants, the safe shopping environment and the proximity of the town centre to the seafront as being Sandown’s best points.

# 5.10 Shanklin

## Diversity of Uses

5.10.1 The town centre benefits from a good range of retail, leisure and financial service as illustrated in Figure 5.38.

*Figure 5.38 - Breakdown of floorspace by use, Shanklin*




*Source: GOAD and Halcrow Group Ltd 2009*

5.10.2 The quantity and composition of town centre uses has remained largely unchanged since the GOAD survey in 2008. Retail has seen a marginal change with an increase of one unit in convenience retail and retail service use while the number of leisure uses decreased by 4 units.

*Table 5.11 – Diversity of Units 2008 – 2009, Shanklin*

| Use | 2008 | 2009 |
|---|---|---|
| Comparison Retail | 44 | 44 |
| Convenience Retail | 8 | 9 |
| Retail Service | 9 | 10 |
| Leisure | 40 | 36 |
| Finance & Business | 7 | 7 |
| Miscellaneous | 1 | 1 |
| Vacant | 6 | 7 |

*Source: GOAD and Halcrow Group Ltd*

5.10.3 Regent Street serves as the town's hub and offers a strong mix of retail and services. Leisure uses, notably restaurants, cafes and public houses are concentrated on High Street. Financial service uses are mostly located on Regent Street and High Street. Many buildings within the town centre remain in residential use and upper floors provide additional residential uses through the centre.

5.10.4 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Growth or Consolidation

5.10.5 Shanklin has experienced a number of recent developments in the town centre including office space on the High Street and residential developments on Landguard Road and the north of Regent Street. There are however a number of other sites which provide opportunities for expansion to the town centre.

5.10.6 One such opportunity is the currently vacant Woolworths at 36-38 Regent Street. This large unit could be developed to provide smaller retail units as part of a mixed use scheme.

5.10.7 An additional prospect is the vacant restaurant on Palmerston Road. This has the potential to be brought back into use as a restaurant or developed into a mixed use retail and residential scheme.

### Retail Rents and Yields

5.10.8 No information is available.

### Retailer Representation and Retailer Requirements

*Retailer Representation*

5.10.9 Retail in Shanklin is predominantly represented by local and independent retailers. Multiple retailer representation is limited to Boots the Chemist, Timpson and Steadman, Toymaster, Co-op, Somerfield and Lidl.

5.10.10 Low multiple retailer representation is expected for smaller towns. It is likely that Sandown is an attractive location for multiples as it maintains relatively strong retail activity notably on Regent Street. The area could benefit from additional multiple retailers which would only strengthen the town's role as a local shopping centre.

*Retailer Requirements*

5.10.11 Low multiple retailer representation is expected for smaller towns. However it is also indicative to a lack of interest from larger multiples from locating to the centre. According to FOCUS, Shanklin received interest from two multiple clothing retailers, Peacocks and The Original Factory Shop.

*Figure 5.12 – Retailer Requirements, Shanklin*

| From sq ft | To sq ft | Class | Retailer |
|---|---|---|---|
| 4500 | 5500 | A1 | Peacocks |
| 7000 | 15000 | All | The Original Factory Shop |

*Source: FOCUS*

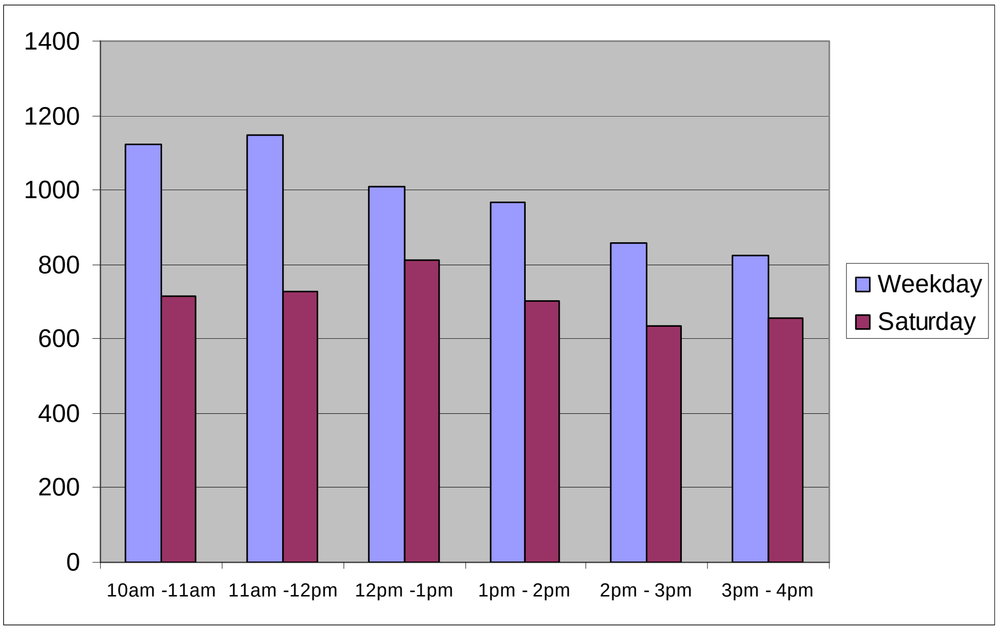
### Unit Vacancy

5.10.12 The on-street survey recorded 17 vacant retail and service units in the town centre which equates to 9.2% of total retail and service units. This is below the UK average of 10.24%. Vacancies are concentrated on High Street (5), Palmerston Road (5) and Regent Street (4) and mainly comprise smaller A1 retail units.

### Pedestrian Flows

5.10.13 Survey findings revealed that on average 987 people passed along the High Street on the hour between 10am and 4pm on the weekday. However the figure reduced to 707 on Saturday. Peak times were recorded between 12pm and 1pm were counters recorded 1,008 and 810 for the weekday and a Saturday respectively.

*Figure 5.39 – Hourly footfall levels on High Street, Shanklin*




*Source: Research & Market Plus, 2009.*

## Accessibility

*Traffic Management*

5.10.14 On the day of survey, traffic was moving well throughout the town centre during the day. A small level of congestion was building up at the junction of Regent Street and Falcon Cross Road at evening peak time. Traffic build up was also noted at the junction of High Street and Victoria Road.

*Public Transport*

5.10.15 Shanklin is well served by public transport. Shanklin is one of the few towns on the Island that benefits from rail connections. Services operate to Sandown, Brading, Lake and Ryde which operate twice an hour, daily. Shanklin railway station is located a short distance immediately north of Regent Street. Southern Vectis offers daily and frequent direct bus services operate from the centre to Ryde, Newport, Sandown and Ventnor. Wightbus offers more limited services to Newport, Lake, and Sandown. The company also operates rail link bus from Shanklin railway station to St Lawrence via Ventnor and Upper Bonchurch.

5.10.16 Taxi services appear more limited in Shanklin. The only visible taxi rank was noted at Shanklin railway station which cannot adequately serve the town centre. The town would benefit from a more centrally located taxi rank and in close proximity to evening time uses.

*Parking*

5.10.17 Parking appears to be a particular issue for the town centre. On-street parking is very limited and mostly restricted to secondary streets. As a result town centre users rely on designated car parking facilities. The town centre accommodates three long stay car parks on Landguard Road (pedestrian access to Regent Street), Orchardleigh Road and High Street (south). Short stay parking is available at Shanklin railway station and customer parking is provided at the two supermarkets. As in the case for other towns identified in the study, demand for parking Shanklin is exacerbated by current resident permit parking policy[10]. As permit holders are exempt from paying car park charges it encourages private car travel and in turn demand for public car park spaces.

*Walking and Cycling*

5.10.18 Pedestrian access is promoted through a series of pedestrian crossings which attempt to enhance connectivity from the High Street through to Regent Street. Pedestrian movement restricted on High Street due to the narrowness of the street at certain sections and reduces pavement capacity. As a busy traffic thoroughfare, Regent Street would benefit from a pedestrian crossing midway between the junctions of North Road and Falcon Cross/Clarendon Road.

5.10.19 Cycle parks were noted adjacent to the public car parks, railway station and at the two supermarkets. While cycle parking provision is adequate other facilities could be improved such as providing cycle space within the road network in particular at traffic lights.

*Disabled Access*

5.10.20 On the whole, access for persons with disabilities is good. Dropped curbs and texture paving is present at all pedestrian crossings points in the town centre. Wheelchair access is restricted to one side of High Street where the street narrows and results in a raised pedestrian walkway that is accessed by stairs. Designated parking spaces are accommodated on all of the main streets.

5.10.21 A ‘dial-a-bus’ service operated by Wightbus provides connections to Newport and Bembridge via St Helens and Sandown for the elderly and persons with disabilities. The service runs on Thursdays only.

**Quality of Town Centre Environment**

5.10.22 The quality of the town centre environments varies considerably. Conservation policies for the Old Town have ensured buildings and street frontages are maintained at the highest quality.

*Figure 5.40 – Retail and leisure frontages in Shanklin Old Town*


5.10.23 The High Street boasts an attractive street form with many examples of fine Victorian architecture, however, the environment is let down by the condition of many of the buildings particularly upper floors, lack of uniformity of shop frontages and the presence of satellite dishes.

*Figure 5.41 – Poor building and shop front maintenance on High Street, Shanklin*


5.10.24 North of High Street, the square provides a potential focal point for the town centre as a midway point between High Street and Regent Street which could be promoted through enhanced public realm improvements.

5.10.25 The quality of environment on Regent Street is let down by the lack of consistency in building design over time. Many buildings along the street look dated and while functional lack character.

### Quality of Retail Offer

5.10.26 In general, retail offer in the town centre is of standard quality and adequately serves the needs of the local population. Comparison retail provision is distinctly made up of local and independent retailers in fashion, household, personal goods, bulky and specialist goods. National comparison retail brands are limited to Boots the Chemist, Stead & Timpson and Toymaster. Convenience retail is supported by two medium sized supermarkets (Co-op and Somerfield) and traditional convenience retailers including butchers, fishmonger, greengrocer bakers, CTNs and smaller convenience stores. Discount retailer Lidl is located at the edge of the town centre on Languard Manor Road. Secondary locations including Cross Street provide supporting retail. The town contains 6 charity shops which is relatively high for town of this size.

### Crime and Safety

5.10.27 Similar to other smaller towns on the Island, the presence of residential uses on upper floors promotes a safer environment. As the majority of day and evening uses are located on the main thoroughfare this maximises visibility of the town centre user to other pedestrians and motorists particularly at night time. CCTV is not in operation in Shanklin.

5.10.28 Consultation with Hampshire Constabulary (HC) revealed that crime is not an issue for the town centre. The main issues being small levels of antisocial behaviour generated from groups congregating at bus stop on Landguard Road. Crime statistics provided by HC reveal that the greatest number of crime incidents occur on Regent Street (125) and mostly attributed to shop theft. Other hotspots for crime incidents include Landguard Road (103) where there are higher reportings of anti-social behaviour. High Street also attracts a large number of incidents (81), mainly due to anti-social behaviour and violence against a person.

### Public Amenities

5.10.29 In general the level of public amenities are lacking for the town centre. On the day of survey, amenities such as public toilets were difficult to locate also due to a lack of signage particularly around Regent Street. ATMs are provided by retail banks along Regent Street but are lacking on High Street. The town could benefit from more seating. Signs are present at key access points in the town centre (e.g public car parks and train station) in addition information points for tourists

### Public Perception

5.10.30 60 respondents were interviewed in the street survey in Shanklin of which 36 were local residents and 24 were visitors.

5.10.31 Just over half (56%) of respondents where happy with their town centre. Of the remaining 44%, the issues identified included inadequate car parking provision, a lack of choice in shopping and a lack of toilets.

5.10.32 In terms of improvements to the town centre, issues arising from the survey included the need for a better range of shops, the need for more car park provision, a suggestion to pedestrianise a town centre street and the need to improve the general appearance of Regent Street.

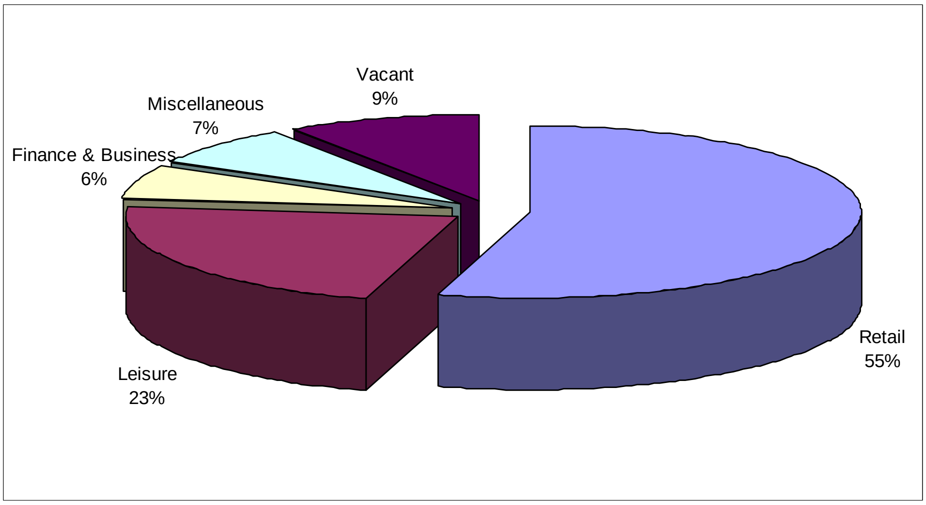
5.10.33 Visitors to Shanklin stated that the high quality physical environment, a perception of safety, the overall ambience and the cleanliness of the streets were what they enjoyed about the town centre.

# 5.11 Ventnor

## Diversity of Uses

5.11.1 Ventnor contains a high proportion of leisure floorspace at 23% which is attributed to the number of hotels, restaurants, cafes and bars that serve the tourist population. Occupied retail floorspace accounts for over half (55%) of town centre floorspace. Finance and business floorspace accounts for a relatively small proportion at 6%.

*Figure 5.42 – Breakdown of floorspace by town centre use, Ventnor*




*Source: GOAD and Halcrow Group Ltd 2009*

5.11.2 The quantity and composition of town centre uses has remained largely unchanged since the GOAD survey in 2008. Retail has seen a marginal change with an increase of one unit in comparison retail and retail service use. Convenience retail offer reduced by one unit.

*Table 5.13 – Diversity of units 2008 – 2009, Ventnor*

| Use Type | 2008 | 2009 |
|---|---|---|
| Comparison Retail | 36 | 37 |
| Convenience Retail | 13 | 12 |
| Retail Service | 10 | 9 |
| Leisure | 16 | 17 |
| Finance & Business | 0 | 7 |
| Miscellaneous | 4 | 4 |
| Vacant | 11 | 11 |

*Source: GOAD and Halcrow Group Ltd*

5.11.3 Town centre uses are mapped for each street in Appendix 3.

### Potential Capacity for Growth or Consolidation

5.11.4 Opportunities to expand the town centre are limited; however, there are a number of sites and buildings within the town centre that could benefit from redevelopment.

5.11.5 A proposal at 52-58 the High Street received planning permission in early 2008 to develop 4 vacant units into ground floor retail and above residential. Tesco will accommodate the 407 sq m of ground floor retail space with 9 residential units to be built on the 1$^{st}$ to 3$^{rd}$ floors.

5.11.6 The site of 22 Pier Street is to be developed into two retail units at ground level and 10 flats above following the granting of planning permission in 2007. A total of 146 sq m of retail space will be provided in the proposal.

5.11.7 A further opportunity for development in the town centre is on the site of the Central Hotel Public House which is currently in a poor physical state. The site could be developed and extended to the rear to provide additional space along Market Street. The development of this unit will provide an improved frontage to the High Street.

### Retail rental values and yields

5.11.8 Retail rental values and yields are not available.

### Retailer requirements

5.11.9 Retailers in Ventnor are predominantly local or independent businesses. Multiple retailers are limited and represented by Somerfield, Alliance Pharmacy and Boots the Chemist No retailer requirements are recorded for Ventnor.

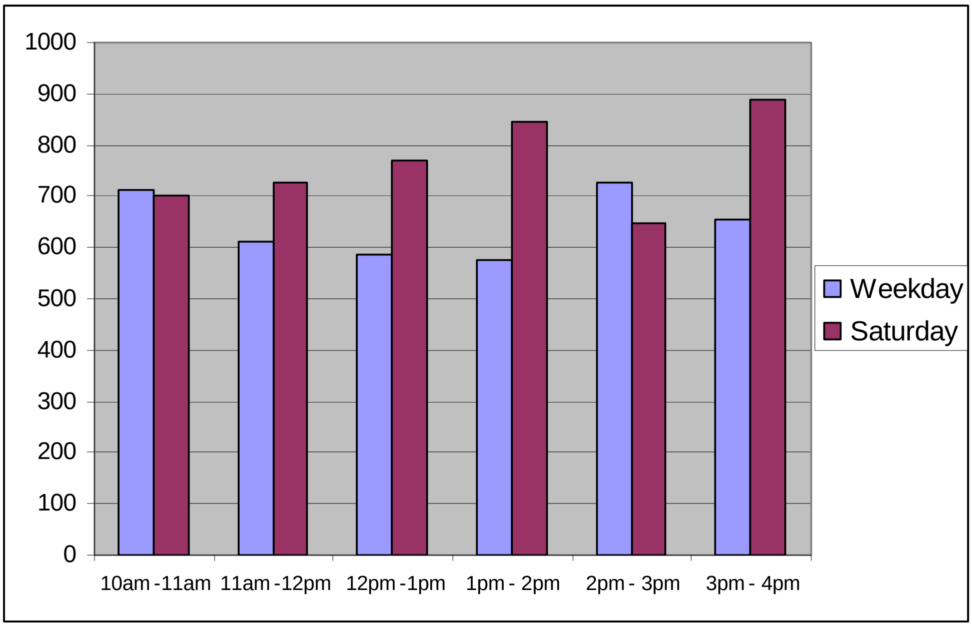
### Vacancy Rates

5.11.10 The on-street survey recorded 11 vacant retail and service units and includes a vacant hotel on High Street. This figure remains unchanged from the previous survey under taken by GOAD in November 2008. The number of vacant units equates to 12% of total units. This is above the UK average of 10.24 %. Vacant units mostly comprise small A1 units, the majority of which are located on High Street (8), a significantly high for a primary shopping street of this size.

### Footfall

5.11.11 Survey findings revealed that on average 645 people passed along the High Street on the hour between 10am and 4pm on the weekday. The number of increased to 763 on a Saturday. Peak times were recorded between 2pm and 3pm on a weekday (726) and later on a Saturday between 3pm and 4pm (888).

*Figure 5.43 – Hourly footfall on High Street, Ventnor*




*Source: Footfall Survey, Research & Market Plus 2009.*

## Accessibility

*Traffic Management*

5.11.12 A one-way traffic system is in operation on the majority of streets within the town centre. On the day of survey traffic was moving freely. The only evidence of traffic build up was at the junction of Church Street and High Street.

*Parking Provision*

5.11.13 Parking provision for the town centre is largely confined to the long-term public car park (charged) on High Street. On the day of survey few spaces were available. Additional long term car parks are located a short distance away from Pier Street and High Street at Dudley Road, Market Street and adjacent to the Winter Gardens. On-street parking is very limited and where available is free for short term use (30 mins). Due to the narrowness of streets, on-street parking is restricted to one side on most streets in the town centre. Parking capacity issues can again be attributed to resident permit parking policy[10]. As in the case for the majority of towns identified in this study, demand for public car spaces is exacerbated by the exemption of permit holders from public car park charges.

*Public Transport*

5.11.14 Ventnor is served by the Island's bus network. Southern Vectis provide daily and frequent services to Newport (No. 3), Ryde (No. 6) and Shanklin (No. 6) and Wroxall (No. 3). Wightbus offer more limited services to Wroxall and Bonchurch (No. 31) in addition to a rail link bus to Shanklin train station.

5.11.15 Taxi ranks are in operation within the centre with ranks located on High Street and Albert Street. On the day of survey taxis were not available at either rank.

*Walking and Cycling*

5.11.16 The centre offers a safe environment for pedestrians. Improvements to footpaths are evident on parts of Pier Street and Church Street which has created more pavement space for pedestrians. Pedestrian crossings are limited to the junctions of Pier Street/High Street and Church Street/High Street. Pedestrian access could be enhanced further south of Pier Street which attracts a strong flow of pedestrians accessing the Esplanade and also at the junction of High Street and Spring Hill for pedestrians accessing the public car park.

5.11.17 Despite boasting many popular cycle routes, Ventnor town centre fails to adequately provide for cyclists. On the day of inspection cycle facilities such as cycle parks were not visible. While cycle lanes may not be feasible for the towns narrow streets, dedicated cycle space is not available at major traffic junctions. The town would benefit from the introduction of cycle parking at key town centre locations (e.g. Somerfield).

*Disabled Access*

5.11.18 Dropped kerbs are in place at all crossings throughout the centre. Textured paving is available at pedestrian crossings at the junction of High Street, Church Street and Pier St. and at one further crossing point on High Street (adjacent to the public car park entrance). Disabled parking adequately on all streets within the town centre including Pier Street were general on-street parking is prohibited. It was noted on the day of survey that all disabled parking spaces were occupied and many of which were not displaying the relevant 'blue badge' which suggests lack of enforcement.

5.11.19 A 'dial-a-bus' service operated by Wightbus provides connections to Newport and via Whitwell and Niton for the elderly and persons with disabilities. The service runs on Fridays only.

### Quality of Town Centre Environment

5.11.20 The assessment focuses on the key shopping streets in the town centre, High Street and Pier Street. The town environment is characterised by its narrow streets, fine Victorian terraces and Esplanade. Majority of shops have retained the original Victorian shop fronts or have installed in most cases acceptable modern fascias.

5.11.21 On the whole, the quality of the environment on High Street is average and would benefit from simple improvement works. The street boasts an attractive and ornate Victorian street terraces and consisting of retail ground floor uses and upper floor flatted dwellings. Redevelopment of some building fronts is evident on parts of the street, mainly to the western end. The quality of shop fronts varies considerably. There is evidence of good investment in shop frontages however the persistence of vacant units and charity shops and the poor maintenance of those units impacts considerably on the vitality and quality of the environment. The vacant hotel building to the west of the High Street is a very visible eyesore given its location to the town's main car park.

*Figure 5.44 – Attractive shop fronts versus poor shop fronts on High Street, Ventnor*


*5.11.22* Pier Street is comprises three storey Victorian terraces with retail on ground floor and upper floor flatted dwellings. In general the quality of the shop frontages are good and include a mix of original style Victorian fronts and modern fascia. Similarly to High Street, certain sections of upper floor frontages have been replaced with a modern style of red brick. A small number of upper floor frontages would benefit from renewed paintwork. The presence of satellite dishes on upper floors on Pier Street threatens the quality of the streetscape and vista. The most prominent eye sore on the street is the former bus depot which is currently vacant and for sale. The site has planning consent for two ground floor retail units with residential on upper floors but has remained undeveloped. The building creates a gap in the streetscape and any redevelopment should apply a building design that complements the surrounding architecture.

*Figure 5.45 - Vacant former bus depot on Pier Street, Ventnor.*

5.11.23 Investment in pavements is evident which has included the use of attractive red brickwork along High Street and the northern section of Pier Street. The south of Pier Street would benefit from a continuation of footpath improvements as applied to other parts of the street. Soft landscaping is confined to the Esplanade Gardens. Within the town centre itself, hanging flower baskets are visible at intervals along Pier Street, in some cases not well maintained. Planting and flower baskets are displayed with good effect around High Street car park.

### Quality of Retail Offer

5.11.24 While the quality of individual retail outlets is good in Ventnor, the range of goods on offer is geared towards the tourist market. The town centre contains a particularly large number of gift shops and antique retailers but provides a much smaller range of general comparison retail and limited to small number of clothing and homeware retailers. Niche retailing is well represented in the town centre and includes a diverse range of specialist shops (e.g. hobbies, musical instruments, confectioners, pet shop, etc.). The range of convenience offer is small but adequate for a town of this size. Convenience retail is largely provided by Somerfield and supplemented by smaller providers including a butcher, bakery, delicatessens, grocers and CTNs. Planning permission was granted in 2008 for a Tesco Express on the High Street immediately opposite the public car park which has yet to be implemented. The town contains a strong presence of retail services including hairdressers, tattoo parlour and laundrette.

5.11.25 The number of charity shops in the town centre is particularly high (7) and has increased since the last GOAD survey. While charity shops may be beneficial in maintaining activity in otherwise vacant units, in the long term they have an adverse impact on the vitality of the shopping street. This is a particular concern for Ventnor particularly when coupled with the high number of vacant units in the town centre.

### Crime and Safety

5.11.26 Consultation with Hampshire Constabulary highlight areas were crime and antisocial behaviour can compromise the safety of some areas. Most incidences of antisocial behaviour occurred during the evening time and are concentrated where large groups congregate. Reporting of crime incidences are highest for High Street (87) mainly attributed to anti-social behaviour and violence against a person. Incidences of crime were also high on Pier Street (70) were reporting of shop theft was common.

### Public Amenities

5.11.27 A cluster of public amenities are located at High Street car park including an information point, signs and telephone kiosks. ATMs in the town centre appear limited for the town centre. An ATM facility is available at one point, at the junction of High Street and Pier Street. Public toilets are provided on Church Street and Market Street.

### Public Perception

5.11.28 The survey in Ventnor had 50 respondents. 29 were local residents and 21 were visitors.

5.11.29 Just over half of the survey respondents stated that they had no particular dislikes about the town centre. Of the remaining 44%, the main issues raised were a lack of retail provision, poor standards of street cleanliness and an unpleasant shopping environment.

5.11.30 36 respondents made suggestions for improving the town centre. The most popular included the provision of a better range of shops, the provision of more children's facilities, improvements to the pedestrian environment, better public transport services and more car parking.

5.11.31 The survey asked visitors to Ventnor what they liked about the town centre. The most prominent responses included the general ambience of the place, the cleanliness of the streets, the attractiveness of the physical environment and the amount of car parking.

# 6 SWOT ANALYSIS

## 6.1 Introduction

6.1.1 The Health Check indicators are brought together to present a picture of vitality and viability of each centre and are summarised in a SWOT analysis. The SWOT analysis was also informed by consultation with key town centre stakeholders. The purpose of the consultation exercise was to understand the underlying issues for each centre from the point of view of key business interests and how the towns can progress forward.

## 6.2 Consultation

6.2.1 Consultation was undertaken with representations at the Isle of Wight Chamber of Commerce, Business Associations for Ryde, Cowes, Sandown, Shanklin and Ventnor and Environment and Neighbourhoods Officers for each of the study towns. The findings of the consultation exercise are included within the SWOT analysis.

6.2.2 A SWOT analysis has been prepared for each town is provided in the following sections:

# COWES

## Strengths

Attracts a large sailing fraternity who use the town as a base or pass through on a wider sailing trip.

Cowes has a strong retail base focussed on tourists and sailing visitors. There is an equally strong leisure based offer including cafes, restaurants and bars.

There is good occupancy in the upper floors of the town centre which provides increased town centre population and a safer retailing environment

The passenger ferry terminal attracts high visitor numbers that stay or pass through the town.

The business survey highlighted the cleanliness of the streets, good pedestrian access and well maintained public areas as positives in the town centre.

## Weaknesses

The town survey and discussions with local businesses have highlighted the issue of limited town centre car parking as a major constraint on the vitality of Cowes. This can restrict the number of tourists and visitors stopping in the town centre.

Resident permit policy is creating an artificial demand for public car parking spaces which restricts capacity for non-permit holders and other town centre users. A perceived lack of public parking may discourage people from using the town centre.

There is a perception amongst local residents and businesses that the quality of the pedestrian environment in general and maintenance of surfaces is poor.

## Threats

Perceived traffic issues amongst local residents and the business community in Cowes. Town centre congestion at peak times is identified as having a detrimental effect on visitors' choices to stay in the town or not.

A desire for more customer focussed convenient town centre car parking was also identified. Restricting people's parking choice and time limit is putting people off using the town centre.

## Opportunities

Potential to expand the high end tourism offer to capitalise on the growing nautical and sailing tourist trade.

Successful street markets, events and festivals have attracted increased visitor numbers and more diverse tourists to the town centre. Establishing a co-ordinated approach to these events and introducing much more focussed advertising and marketing may allow these to expand and attract even more visitors.

There were significant issues raised in the business survey with regards the maintenance and appearance of vacant or abandoned buildings in the town centre. A programme of painting or covering disused buildings in the town centre may improve the appearance of key streets and allow temporary improvements whilst these building lie empty.

# EAST COWES

| Strengths | Weaknesses |
|---|---|
| Good local centre that provides for residents<br><br>Ferry link to Southampton attracts high visitor numbers and through traffic<br><br>Public transport services in East Cowes were recognised as being of a good standard by the respondents to the business survey | The general shabby appearance of the town centre is not attractive to visitors passing through the town. This puts many off stopping and using the services on offer in the town centre.<br><br>There is a general lack of non-retail town centre functions and uses which is restricting the type of tourist and visitor that the town can attract<br><br>There are significant traffic management issues in the town centre as a result of the ferry operations. This often means major delays in getting into and through the town centre for non ferry traffic. |

| Threats | Opportunities |
|---|---|
| There are a number of poorly maintained buildings in the town centre that contribute to the general shabby appearance. These can be off putting to tourists and visitors and require to be addressed.<br><br>There is a limited retail offer in the town centre which will restrict the potential of attracting tourists and visitors. The new masterplan has the potential to provide additional floorspace and this should be controlled through planning to promote retail functions currently missing from the town centre.<br><br>All respondents to the business survey in East Cowes stated that customer parking provision was poor or very poor in the town centre. This will be an issue in attempting to attract more visitor numbers into the town. | The South East England Development Agency are leading a masterplan development that will provide the opportunity to create an attractive quarter adjacent to the town centre. This is likely to include new housing, a hotel and retail uses. If well designed, this has the opportunity to provide a new offer in East Cowes.<br><br>There is major potential to capitalise on the large water based community at the esplanade through the provision of appropriate retail and service provision offer in the town centre.<br><br>Respondents to the business survey in East Cowes stated that increased street activities and entertainment would be a welcome boost for the town centre. |

# FRESHWATER

## Strengths

The town has a broad rural catchment

School Green and Moa Place offer an attractive environment.

The leisure centre serves as a key asset for the town

The town operates a monthly farmer's market, albeit out of centre.

## Weaknesses

Economic decline generated by the closure of key businesses has had a long standing impact on the vitality and viability of the town centre.

Despite having a wide resident catchment, the town fails to attract sufficient resident expenditure to support its town centre businesses.

Unlike other centres in the study, Freshwater cannot rely on tourism to boost its local economy.

High level of vacant floor space in key retail areas due to leakage to other centres and a lack of tourist trade

## Threats

Continued threat of economic decline through loss of manufacturing jobs

Freshwater has become a commuter town which is restricting opportunities for new retail and leisure provision in the town centre

Town centre users are put off by the poor quality and range of retail and the poor quality of the town centre environment. Without action, the number of people using the town centres will dwindle further.

## Opportunities

The opening of a Sainsburys store in the town centre may attract new retailers.

Opportunities to consolidate town centre uses along Avenue Road through redevelopment of single storey retail blocks.

## NEWPORT

### Strengths

The primary shopping area in Newport had a strong retail and leisure offer with a wide selection and high quality of shops, cafes and restaurants. This serves both the local residents and a wide range of tourists and visitors to the island. This is augmented by a good quality shopping environment that is attractive and vibrant.

Local businesses have identified that access to public transport and pedestrian access is good or very good. Public art and street furniture are also identified as being of a good standard in the business survey.

### Weaknesses

For a town the size of Newport, there is a relatively high retail vacancy rate on prominent streets. This can detract from the quality physical environment particularly where these units are left unattractive and unmaintained.

There are few large floorplates retail units in and around the town centre that can attract regional and national multiples to the town centre. This can limit the retail offer to being bespoke tourist and local resident focussed.

There are significant traffic congestion issues in the town centre that can be off putting to visitors. This was identified by local businesses as a major area of concern.

### Threats

There is a lack of comparison shopping offer in the town centre and restricted opportunities for growth and expansion which will hamper the ambition for the town to become a regional retail centre. In addition, restricted car parking provision across the town centre will limit visitor numbers.

A concern among the local business community as identified in the survey relates to the quality of road and pavement surface maintenance, with some claiming there are a number of dangers to pedestrians and traffic.

### Opportunities

There are a number of successful street markets and events that attract increased visitors to the town. These could be targeted through promotion and marketing to allow expansion during peak months.

There is the potential to develop a park and ride facility using pre-existing bus lanes through the town centre as a means of combating traffic congestion and increasing accessibility.

There may be an opportunity to pedestrianisation or create of shared surfaces in the town centre (e.g. part-pedestrianise High Street) to give more priority to pedestrians and limit the volume of through traffic

## RYDE

### Strengths

Ryde town centre has a strong retail offer with a good mix of national multiples and local shops. There is also a good mix of leisure uses including cafes, restaurants and bars. This provides a solid tourist and local shopping centre offer in the town.

The ferry link to Portsmouth attracts high visitor numbers and through traffic which adds vitality to the town centre.

The Victorian architecture in the town centre provides a strong character and creates a unique ambience which is attractive to a range of tourists.

Public realm improvements in St Thomas Square have contributed to improving the quality of the environment.

### Weaknesses

For a town the size of Ryde, there is a relatively high retail vacancy rate on prominent streets.

This can detract from the quality physical environment particularly where these units are left unattractive and unmaintained. This issue was identified in the business survey as a major concern by other shopkeepers and businesses.

Poor maintenance of some upper floors, particularly on Union Street.

Traffic management and parking needs to be addressed.

### Threats

Unmanaged evening economy uses in central areas encourage anti-social behaviour which may dissuade tourists and visitors

There is a perception of traffic congestion in the town centre which may deter residents from shopping in the town centre.

Vandalism and anti-social behaviour is seen as a threat by many businesses.

### Opportunities

On the back of the good work in St Thomas Square, a wider public realm strategy needs to be fully supported across the town centre. Implementation of public realm proposals for High Street should be prioritised.

Future restoration of the Victorian Arcade will serve as an added attraction for retail and tourism.

Townscape Heritage Initiative schemes could be pursued to improve building frontages on Union Street.

Connectivity between the bus, rail and ferry terminals to the rest of the town centre should be investigated.

The was strong demand in the business survey for Ryde for increased town centre promotion and marketing

# SANDOWN

## Strengths

Sandown serves as a local population as an administrative, retail and service centre. The retail provision is focussed on the local residents with some limited tourist shops.

Sandown is a traditional seaside resort that is supported by a large leisure and entertainment offer across the town

Sandown benefits from being on the island's railway line and has a direct connection to Ryde and other centres.

## Weaknesses

The retail offer is of a limited quality and range. This is sufficient for local convenience shopping and limited tourism requirements.

There is a lack of national multiple stores in the town centre and few buildings with appropriate floorplates.

Heavy traffic in the town centre has a detrimental effect on access into and out of the town centre

The condition and maintenance of vacant and historic buildings in the town centre have been rated as poor or very poor by the majority of respondents to the business survey

## Threats

The poor quality shopping environment across the town centre may be a barrier to attracting inward retail investment.

There is a lack of long stay car parking in and around the town centre which may influence visitors' decision whether to stop in the town or not.

The business survey in Sandown identified high parking charges as an issue in the town centre. This may be off putting to tourists and visitors.

## Opportunities

The arrival of the Sainsbury's store in the town centre provides a basis for retail growth that may attract other national multiples.

The esplanade is of a higher physical quality than the town centre and may provide the basis for streetscape and inward investment.

The business survey in Sandown identified the opportunity to market the town centre and put on events and activities that may more attract tourists and visitors

## SHANKLIN

| Strengths | Weaknesses |
| --- | --- |
| Traditional market town with strong architectural heritage<br><br>Attracts a strong tourist base during the summer months (to the Old Town).<br><br>Good mix of local and tourist focussed retail and leisure provision.<br><br>Vibrant retail quarter i.e. Regent Street.<br><br>Railway station in the town centre offers good connection to other towns on the east of the island. | There is a perception of a lack of car parking provision in and around the town centre which is exacerbated by current resident permit parking policy.<br><br>High level of charity shops which gives the impression of a poor quality of retail provision<br><br>The maintenance of road and pavement surfaces was rated as being poor or very poor by local businesses in the survey |

| Threats | Opportunities |
| --- | --- |
| Varied quality of public realm and streetscape across the town centre may detract from the heritage quality of Shanklin<br><br>The business survey in Shanklin identified the poor quality of maintenance of vacant buildings in the town centre as a key issue. These are often large and prominent and may be off-putting for visitors, tourists and inward investment. | Distinctive areas for retail, leisure and tourist uses could be identified and marketed to provide a wider offer across the town<br><br>The townscape heritage of Shanklin provides an opportunity to attract additional funding sources and to attract a wider range of tourists |

# VENTNOR

| Strengths | Weaknesses |
|---|---|
| The town contains a wealth of Victorian Heritage, and a wide range of local attractions.<br><br>Traditional Victorian seaside town with strong architectural heritage that attracts large numbers of summer tourists.<br><br>Good maintenance of roads and pavements on key shopping streets.<br><br>Good mix of local and tourist focussed retail and leisure provision | The peripheral location makes the town less accessible than other coastal locations on the east of the Island.<br><br>High level of vacant units and charity shops which gives the impression of a poor quality of retail provision<br><br>Lack of general comparison retailing.<br><br>High level of charity shops which gives the impression of a poor quality of retail provision |

| Threats | Opportunities |
|---|---|
| Increase in the number of vacant units is a major concern and indicates a reduction in town centre activity.<br><br>Vacant units and charity shops are compromising the quality of retail frontages which detract from the heritage and quality of the town centre environment. In turn this may be putting retailers off from locating to the town centre.<br><br>Street cleanliness was seen as a particularly issue for town centre users and business owners. Maintaining clean streets is essential for tourism.<br><br>The availability of public transport services is also seen as poor and can dissuade residents and tourist from travelling to Ventnor. | Encourage or facilitate the development of prominent vacant buildings for new leisure and retail.<br><br>Capitalise on the town's Victorian heritage and promote the town as a key tourist destination for the island. Investigate alternative tourism opportunities.<br><br>Investigate improving public transport services by increasing the frequency of service and extending routes. |

## 6.3 Emerging Priorities

6.3.1 The priority areas have emerged from the SWOT for each town centre are identified below:

### Cowes

6.3.2 Promotion and Branding – Cowes should be promoted as a premier sailing destination. Business planning work to establish the potential for growth, infrastructure and additional service requirements and indirect opportunities should augment a focussed marketing and advertising campaign.

6.3.3 Traffic Management Strategy – A detailed review of traffic and parking management in the town centre should be undertaken to identify the full extent of traffic issues. This may then lead to a town centre transport strategy being required to resolve key issues. A revision of Island wide parking policy should examine the impact of permit parking on public parking facilities not just exclusively to Cowes but other towns across the Island.

6.3.4 Town Events – The Council should support and encourage an expanded series of town events including farmer's markets, sailing regattas, etc. These should be marketed widely across the south of England.

### East Cowes

6.3.5 New Square – The development of the new town square should be focussed towards attracting the sailing fraternity into the town centre from the esplanade.

6.3.6 Shop front and Townscape Enhancement – Shopfront enhancement grants should be considered to promote a more attractive retail environment whilst general streetscape improvements could improve the overall appearance of the town centre

6.3.7 Ferry Marshalling and Traffic Management – Consideration should be given to developing a more appropriate ferry marshalling and traffic management strategy to reduce congestion in the town centre at ferry departure times

### Freshwater

6.3.8 Contract the Town Centre – Consideration should be given to contracting the size of the town centre and consolidating town centre uses to the east of Avenue Road and west of School Green Road and Moa Place.

6.3.9 Increasing Activity - the town needs a new day-time population to support existing town centre uses. Development sites should be priorities for employment or educational uses (e.g. training college or campus).

6.3.10 Develop Leisure Sector – opportunities to develop existing sports and leisure facilities could be considered

### Newport

6.3.11 Temporary Shop Fronts – due to the high number of vacant uses on the High Street, temporary measures to cover or hide shop frontages should be investigated. These could be used for wider town centre marketing, commercial advertisements or to display community based art work.

6.3.12 Park and Ride – the Council should support the introduction of Park and Ride facilities for Newport as proposed in the Island Plan. This may reduce traffic congestion and pressures on car parking spaces in the town centre.

6.3.13 Pedestrianisation – Creating a pedestrian orientated area in the town centre would improve the overall shopping environment and help reduce traffic congestion in the town centre. An appropriate traffic re-routing system would need to be in place.

### Ryde

6.3.14 Public Realm Strategy/Townscape Heritage Initiative – The good work completed in St Thomas Square should be the basis for a town centre strategy of improvements. Continuation of THI schemes should be supported in particular public realm and building improvements on High Street. This will create a highly attractive town centre area and shopping environment. Improvements to building frontages on Union Street should be pursued.

6.3.15 Townscape Heritage Initiative – There are many examples where THI initiatives have been used successfully to improve the condition of heritage buildings. This could potential be pursued for key buildings on Union Street, notably the Victorian Arcade.

6.3.16 Transport and Connectivity –Improving the accessibility and amenity for residents and tourists will make the seafront a more coherent and welcoming location and the town centre a more attractive destination.

### Sandown

6.3.17 A New Vision – a new vision needs to be developed that modernises the tourism offer for the town which in turn may open Sandown to a broader tourist market. Focus could be place on tourist leisure such as the development water sports.

6.3.18 Building and Shop Frontages – urgent action is required for parts of the town centre to improve its image. This may require priority grants for properties along the north of High Street and better enforcement of as one of the Island most traditional sea-side towns.

### Shanklin

6.3.19 Town Quarters – The promotion of distinct zones or quarters in the town centre for specific function. There are already established areas of concentrated retail, culture and leisure activities that could be further developed into speciality quarters that can attract a diverse range of visitors and tourists.

6.3.20 Townscape Heritage Initiative – The Council should investigate the opportunity of attracting heritage funding to preserve and enhance the historic character of the town centre

### Ventnor

6.3.21 Townscape Heritage Initiative – Opportunities to improve building fronts on High Street could be pursued. Similar to Ryde, a THI should be pursued to improve building fronts on High Street.

6.3.22 Redevelopment Opportunities – development briefs could be prepared for key vacant buildings in the town centre including the vacant hotel on High Street and the vacant garage Pier Street.

6.3.23 Long Stay Destination - Ventnor could be promoted as a weekend and long-stay tourist destination by capitalising on the extensive tourist and leisure attractions the town has to offer. The town's historical credentials as a Victorian spa town could be pursued been promoted as a spa town.

6.3.24 Opportunities and priorities for each town are spatially mapped in Appendix 4.

# 7 RECOMMENDATIONS & CONCLUSIONS

## 7.1 Conclusions

7.1.1 The continuing development of the tourism industry is a key factor for the continued economic health of the Isle of Wight. Maintaining the vitality and viability of the eight town centres is clearly linked to the future of the tourist industry and the quality of life of local residents and businesses. The appropriate approach for the town centres will make a significant and valuable contribution towards this. The findings of the study show that the vitality and viability of the eight town centres varies considerably. Newport, Ryde and Cowes are in the healthiest condition while considerable improvements are needed for East Cowes, Sandown, Freshwater and Ventnor.

## 7.2 Recommendations

7.2.1 A co-ordinated strategic approach needs to be taken for the eight towns centres. The strategy needs to reflect the eco-island vision set out by the Core Strategy that should focus on improving the environmental quality of its town centres and promoting tourism beyond Cowes. Funding needs to be targeted efficient to town centres that will respond to improvement. The strategic approach proposed involves:

1. Examine the relationship between Cowes, Newport and Ryde – successful locations that attract a strong tourist base where current initiatives should be supported.

2. Revaluate the role of Freshwater – the role and function of the town centre has changed. Contraction of the urban centre should be considered.

3. Sandown and Shanklin should be considered in an integrated way – the two centres should play a more complementary role to each other with Sandown serving as the tourist centre and Shanklin as a district retail and service centre for the combined population.

7.2.2 Priority areas identified in the SWOT analysis for each town centre should be considered and where economic benefits can be guaranteed.

7.2.3 A more pro-active and inclusive approach needs to be taken for each town centre. Public and private town centre stakeholders (including the Council, business associations, transport operators, Chamber of Commerce and Environmental Neighbourhood Officers, etc) need to work together to develop a vision, objectives and proposals for each town centre in the context of a clear and straightforward strategy.

# Appendix 1 – Town Centre Health Check Indicators

***Diversity of Uses*** **-** Floorspace and unit data was obtained from GOAD for all towns with exception for East Cowes where a GOAD survey has not been undertaken. Floorspace information is broken down by use type with more detailed analysis provided on retail based uses including

- Convenience retail (e.g. supermarkets, grocers, CTN, shoe repairs, etc.)
- Comparison retail (i.e. all non-food retail sales)
- Retail services (e.g. hairdressers, travel agents, dry cleaners, post office, etc)

An on-street survey of ground floor uses was undertaken to monitor changes in uses and vacancies since the last GOAD survey (2008). In the absence of baseline data for East Cowes, an on-street survey was carried out for each street to record ground floor uses.

***Capacity for Town Centre Growth and Change*** – Town centres will undergo an effectively continuous process of change as new businesses are attracted to centres and existing operations expand or contract their presence. Consideration was given to current and proposed land use allocations in addition to proposed and consented developments.

***Retailer Requirements*** - this provides an indication of how attractive a town centre is to investors. Generally, retailers tend to express interest in locations which are performing well. Information on retailer representation was obtained from Focus and through consultation with local property agents.

***Retailer Representation*** - It is also important to examine the balance between independent and national retailers. While national retailers are a key back bone to the retail market in a town centre, independent retailers provide a unique and distinctive retail offer.

***Rental and Yield Values*** - changing levels in retail rents and commercial yields provides an indication of how key retail areas are performing over time, in particular against competitive locations. Prime pitch locations will command the highest values reflecting the demand for locations that attract the highest footfall levels. Rents and yields achieved at secondary locations can vary and provide a good indication of streets where activity is perceptible to market changes.

Information on retail rentals and commercial yields will be generated quarterly over a 5 year period for each town centre and compared with other similar UK centres. Data will be sourced from local property agents on the Island. Comparison rental and yield values will be obtained from national property agents.

***Vacant Units*** - Not only are vacant units unattractive for town centres, they are an obvious indicator for vitality and viability. While it is common to see temporary vacant units, those that remain unoccupied in the long term can represent market failure and reflect a lack of interest in investment in an area. Data on the number of on-street vacant units was based on the most recent GOAD survey (2008) and updated by way of an on-street survey of vacant units.

***Pedestrian Flows*** - Measuring the flow of pedestrians provides a basic measure of town centre usage and involves counting the number of people passing a key centre location a particular period of time. The use of this indicator is more useful over time as it can be used to identify trends both as a result of local and national influences. As no footfall surveys have been undertaken previously for the 8 towns, figures identified in this study would serve as a benchmark against future town centre health checks. This will allow the Council to monitor future town centre usage. A market research company carried out a footfall survey for each town on a weekday and a Saturday between the hours of 10am and 4pm.

***Quality of Retail Offer*** - the quality of commercial activity will be assessed for each of the towns with particular focus on retail offer. Quality can vary at different locations for example streets that contain a high proportion of charity shops or temporary shops (often occupied by 'pound' stores). Poor quality shopping can have a negative effect on where people shop and hinder improvement schemes and general investment.

***Accessibility*** - town centre viability requires good access for centre users and transport modes. In supporting sustainable transport choices, the assessment examines the frequency of bus services and geographical coverage as well as the location of bus and taxi nodes in the centre.

Cycle facilities were reviewed such as the availability of central parking areas and road space. Car parking facilities will be investigated in particular the availability of on-street and off-street parking, charge rates, time restrictions and potential capacity issues.

The assessment will also monitor measures in place that meet the needs of people with disabilities (e.g. dedicated parking, shop mobility, dropped kerbs, textured paving, vocal crossings, etc.).

Good connectivity should be promoted throughout the town centres and the assessment will focus on the effectiveness of current traffic management and measures in place to promote walkability and pedestrian priority.

***Crime and Safety*** - the importance of the public's perception of crime and safety for a town centre cannot be underestimated. Shoppers often avoid centres where they feel their safety is compromised. Consultation was undertaken with Hampshire & Isle of Wight Constabulary to identify measures in place to deter crime (e.g. CCTV) and identify hot spot location for crime which can be monitored over time. Crime statistics referred in this report relate to incidences recorded over the period August 2008 to September 2009.

***Quality of Town Centre Environment*** - the attractiveness of a town centre strongly influences level of patronage and investment it will attract. The importance of tourism for the Island and its towns places even greater emphasis on maintaining good public realm. An on-street survey was carried out across the eight town centres to assess their physical environment focusing on the levels of maintenance and evidence of public realm improvements. Physical factors considered include:

- Maintenance of public spaces.
- Presence and quality of street furniture
- Levels of graffiti and litter.
- Maintenance and quality of street pavements and street furniture.
- Quality of street frontages
- Maintenance and quality of soft and hard landscapes.

***Public Conveniences*** - the assessment examined the availability and quality of public amenities. Public amenities add to the attractiveness of a town for centre users and cover a range of town centre services such as public toilets, vehicle and pedestrian signage, seating areas, litter bins, etc. A street survey investigated whether there is adequate provision of public amenities and how they are managed and maintained.

***Public Perception*** - the attractiveness of a town centre strongly influences level of patronage and investment it will attract. The importance of tourism for the Island and its towns places even greater emphasis on maintaining

# Appendix 2 – Glossary of Use

## Comparison Retail

Antique Shops
Art & Art Dealers
Booksellers
Carpets & Flooring
Catalogue Showrooms
Charity Shops
Chemist
Childrens & Infants Wear
Clothing General
Crafts, Gifts, China & Glass
Cycles & Accessories
Department & Variety Stores
DIY & Home Improvement
Electrical & Other Durable Goods
Florists
Footwear
Furniture Fitted
Furniture General
Gardens & Equipment
Greeting Cards
Hardware & Household Goods
Jewellery, Watches & Silver
Ladies & Mens Wear & Acc
Ladies Wear & Accessories
Leather & Travel Goods
Mens Wear & Accessories
Music & Musical Instruments
Music & Video Recordings
Newsagents & Stationers
Office Supplies
Other Comparison Goods
Photographic & Optical
Secondhand Goods, Books, etc.
Sports, Camping & Leisure Goods
Telephones & Accessories
Textiles & Soft Furnishings
Toiletries, Cosmetics & Beauty Products
Toys, Games & Hobbies
Vehicle Sales & Accessories

## Convenience Retail

Bakers & Confectioners
Butchers
Confectionery, Tobacco & Newspapers (CTN)
Convenience Stores
Fishmongers
Frozen Foods
Greengrocers
Grocers & Delicatessens
Health Foods
Markets
Off Licences
Shoe Repairs Etc
Supermarkets

## Retail Service

Clothing & Fancy Dress Hire
Dry Cleaners & Launderettes
Filling Stations
Health & Beauty
Opticians Other Retail Services
Photo Processing
Photo Studio
Post Offices
Repairs, Alterations & Restoration
Travel Agents
TV, Cable & Video Rental
Vehicle Rental
Vehicle Repairs & Services
Video Tape Rental

## Office

General Office Space

## Finance & Business

Building Societies
Building Supplies & Services
Business Goods & Services
Employment & Careers
Financial Services
Legal Services
Other Business Services
Printing & Copying
Property Services
Retail Banks

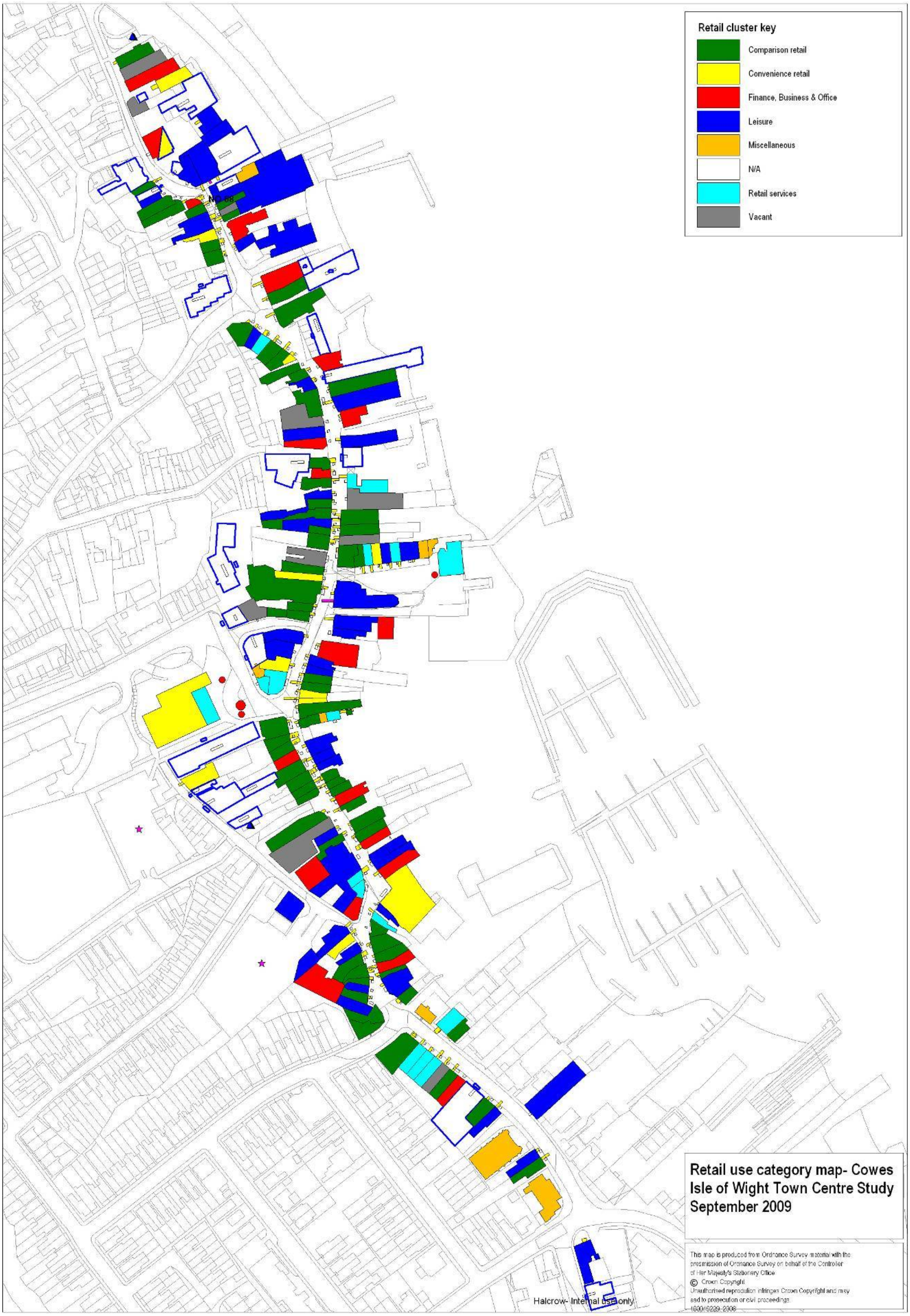
## Miscellaneous

Council Buildings
Dental Services
Entrances and Stores
Emergency Services
Medical Services
Plant Hire
Religious Institutions
Tourist Information
Transport Booking Office
Veterinary Services

## Miscellaneous

Vacant Retail/Leisure
Vacant Office

# Appendix 3 – Town Centre Use Maps


Retail cluster key
Comparison retail
Convenience retail
Finance, Business & Office
Leisure
Miscellaneous
N/A
Retail services
Vacant
Retail use category map- Cowes
Isle of Wight Town Centre Study
September 2009
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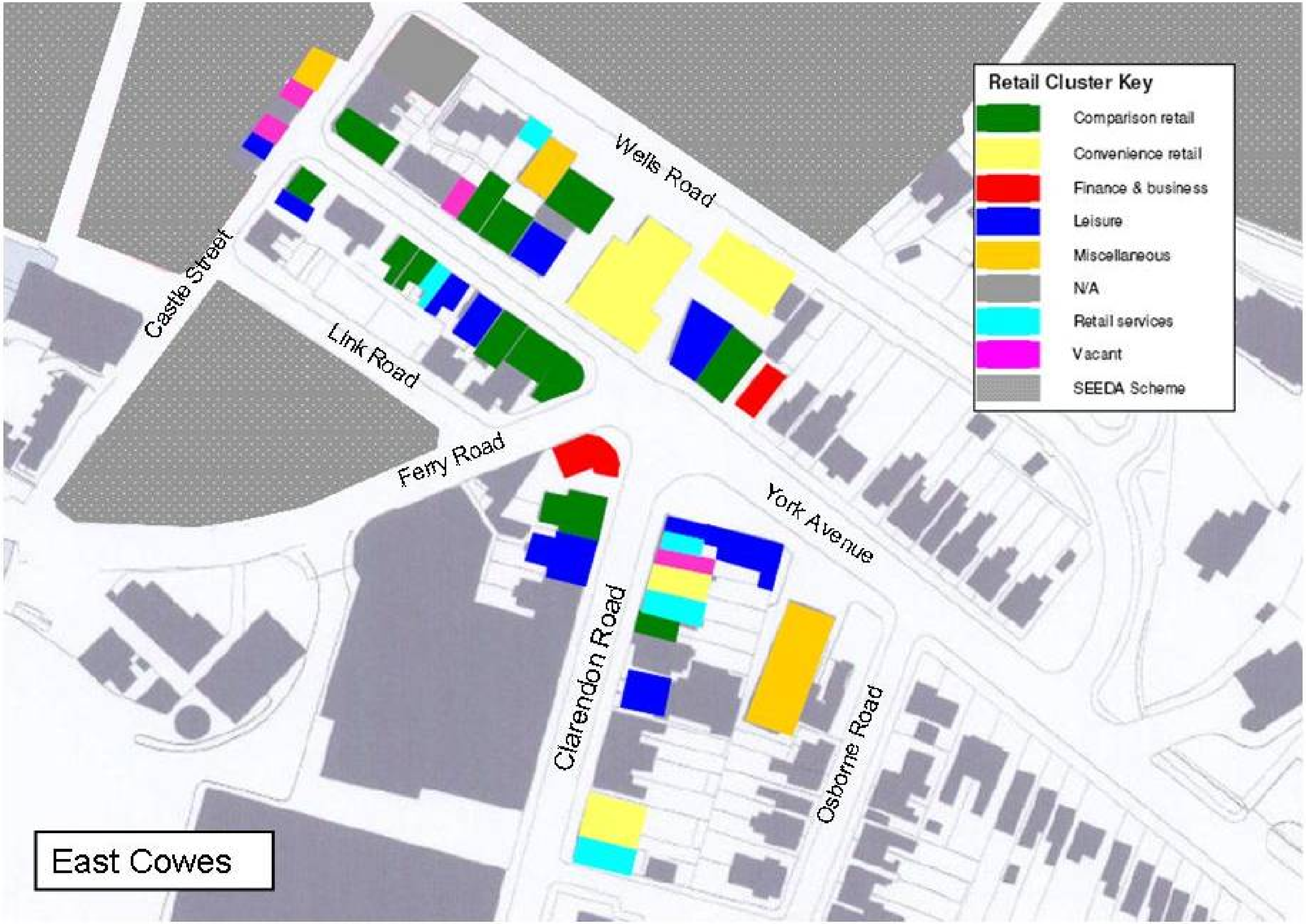
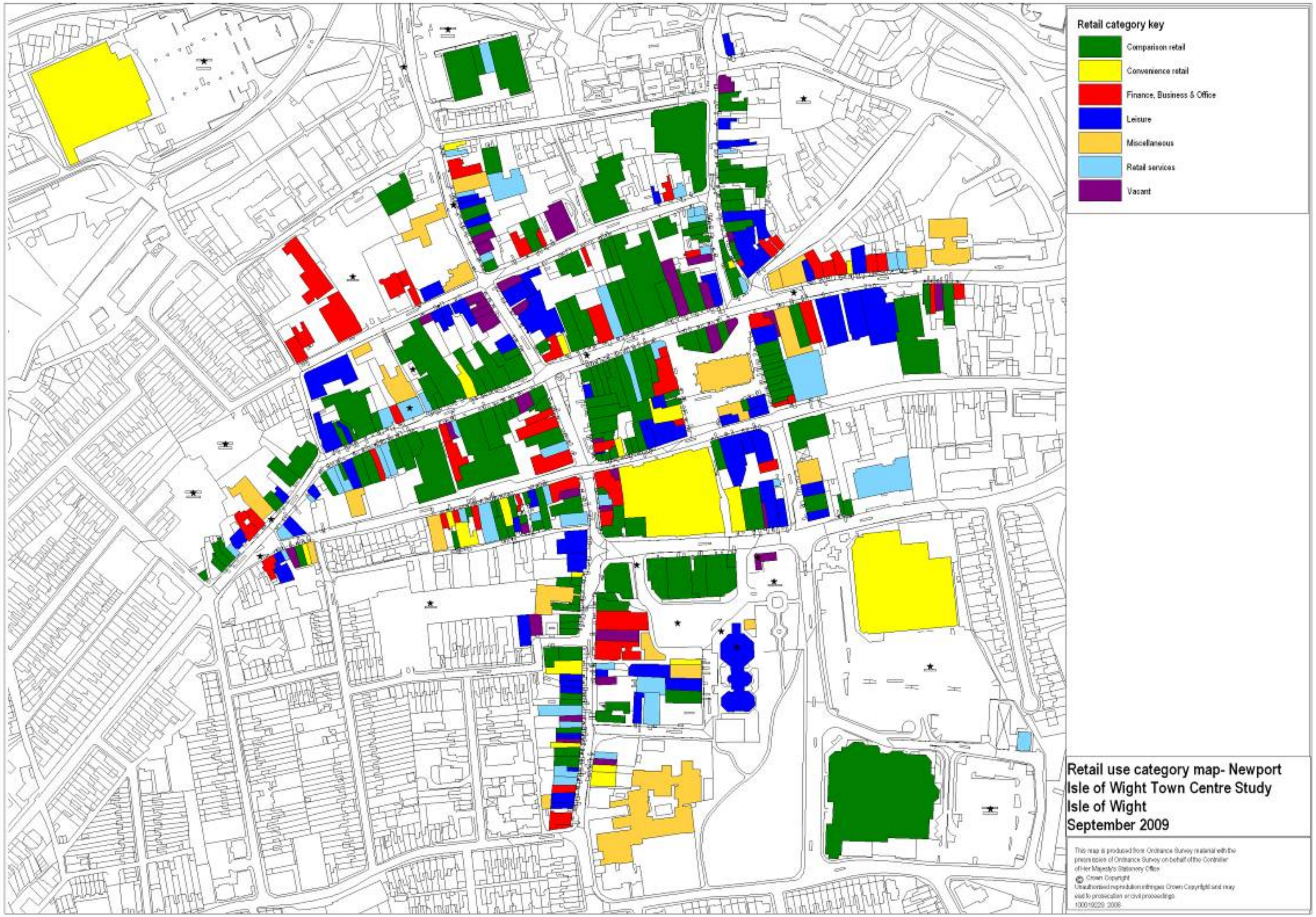

Retail Cluster Key
Comparison retail
Convenience retail
Finance & business
Leisure
Miscellaneous
N/A
Retail services
Vacant
SEEDA Scheme
Wells Road
Castle Street
Link Road
Ferry Road
York Avenue
Clarendon Road
Osborne Road
East Cowes

Retail category results
Finance, Business & Offices
Vacant
Comparison retail
Convenience retail
Miscellaneous
Leisure
Retail services
N/A
Retail use category map-
Freshwater
Isle of Wight Town Centre Study
September 2009


Retail category key
Comparison retail
Convenience retail
Finance, Business & Office
Leisure
Miscellaneous
Retail services
Vacant
Retail use category map- Newport
Isle of Wight Town Centre Study
Isle of Wight
September 2009
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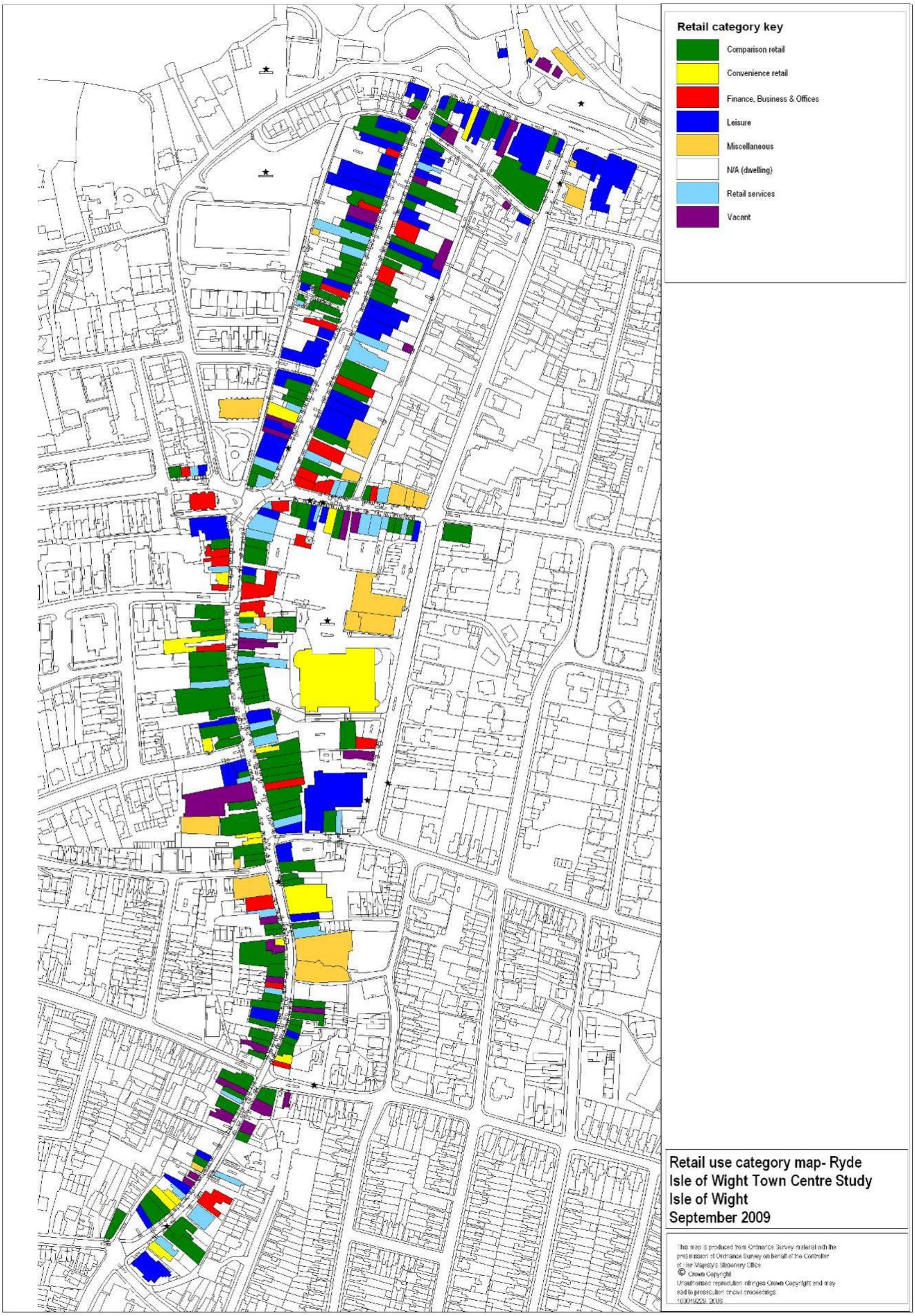
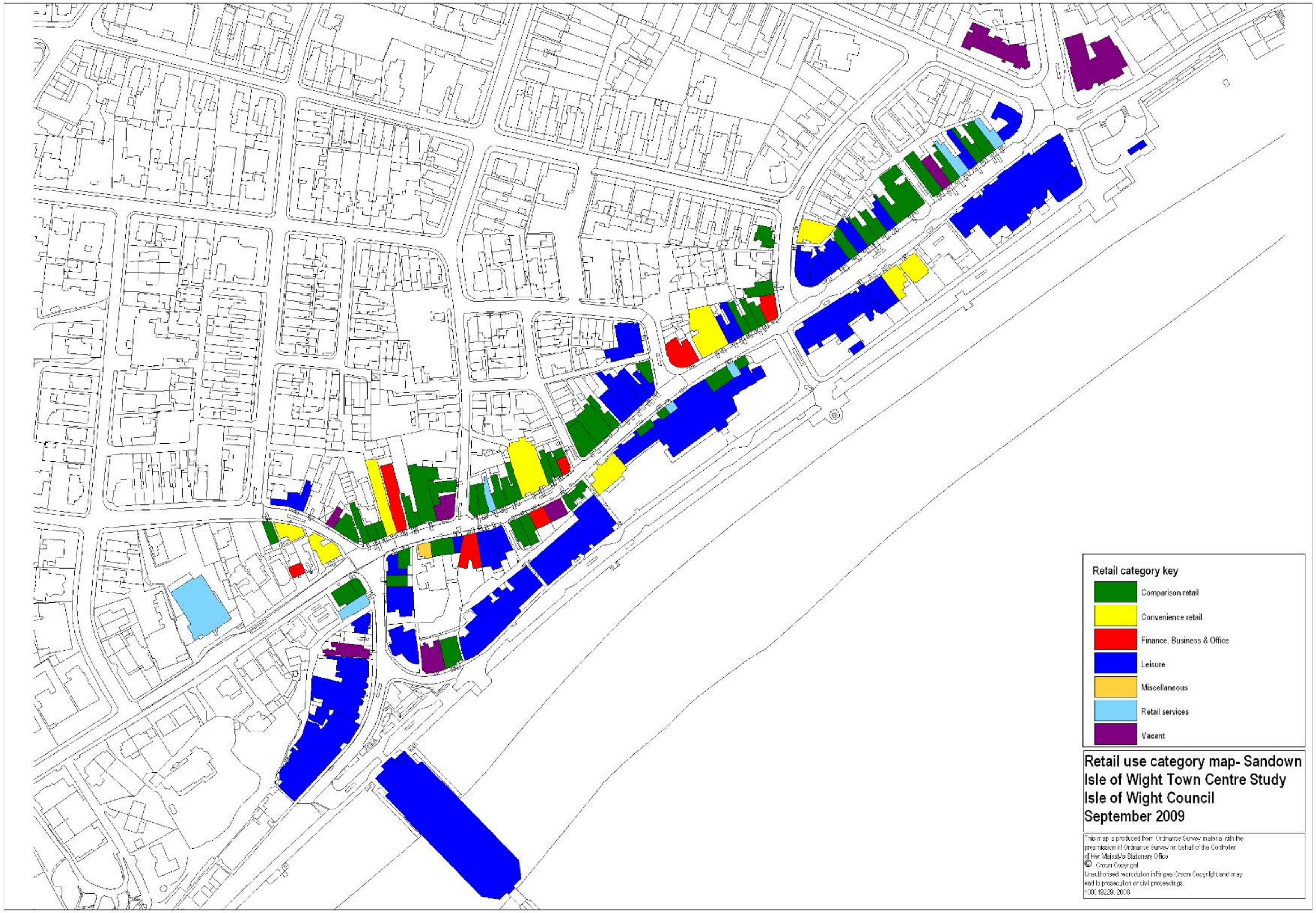

Retail category key
Comparison retail
Convenience retail
Finance, Business & Offices
Leisure
Miscellaneous
N/A (dwelling)
Retail services
Vacant
Retail use category map- Ryde
Isle of Wight Town Centre Study
Isle of Wight
September 2009


Retail category key
Comparison retail
Convenience retail
Finance, Business & Office
Leisure
Miscellaneous
Retail services
Vacant
Retail use category map- Sandown
Isle of Wight Town Centre Study
Isle of Wight Council
September 2009
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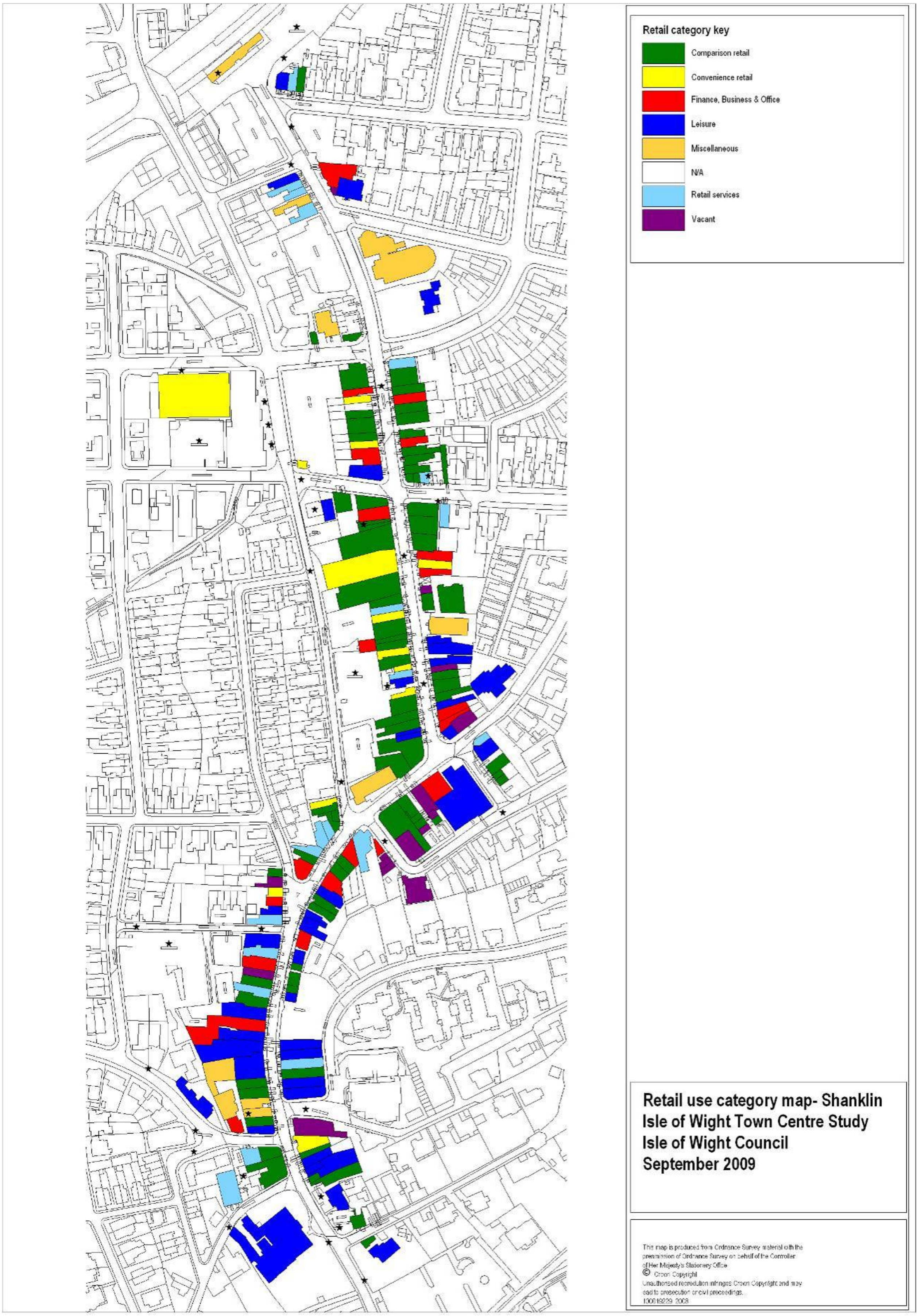
Retail category key
Comparison retail
Convenience retail
Finance, Business & Office
Leisure
Miscellaneous
N/A
Retail services
Vacant
Retail use category map- Shanklin
Isle of Wight Town Centre Study
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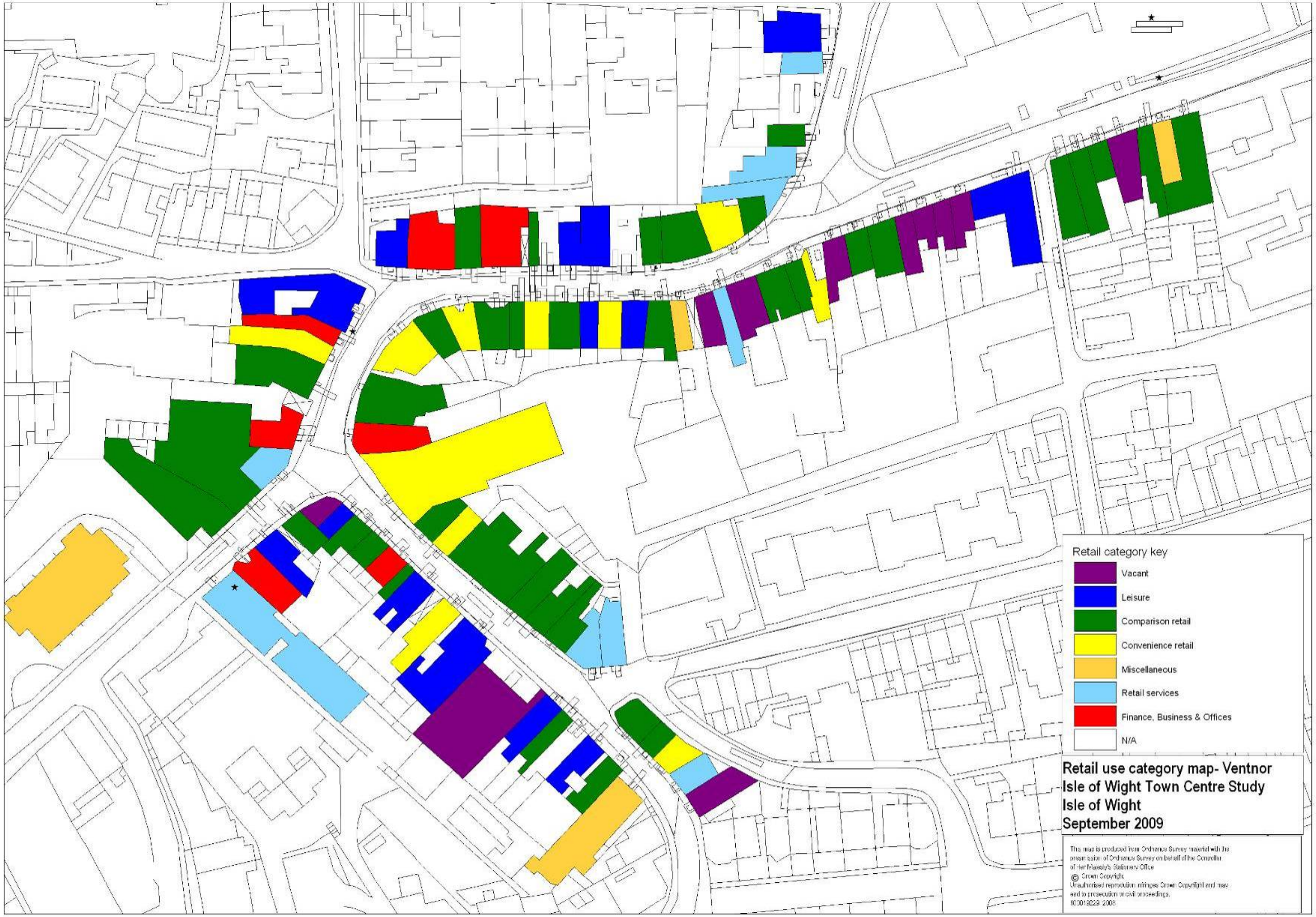
Retail category key
Vacant
Leisure
Comparison retail
Convenience retail
Miscellaneous
Retail services
Finance, Business & Offices
N/A
Retail use category map- Ventnor
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Isle of Wight
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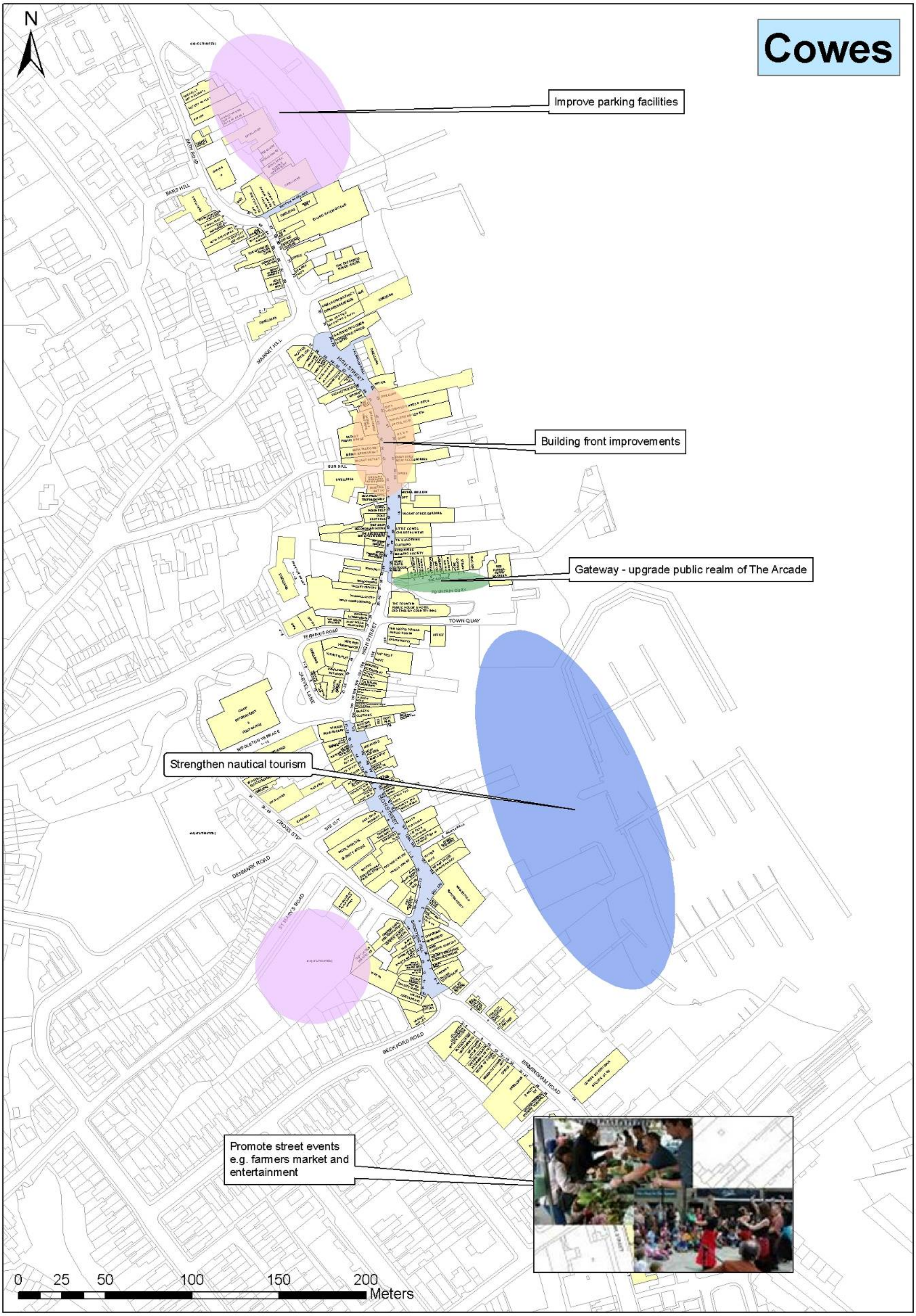
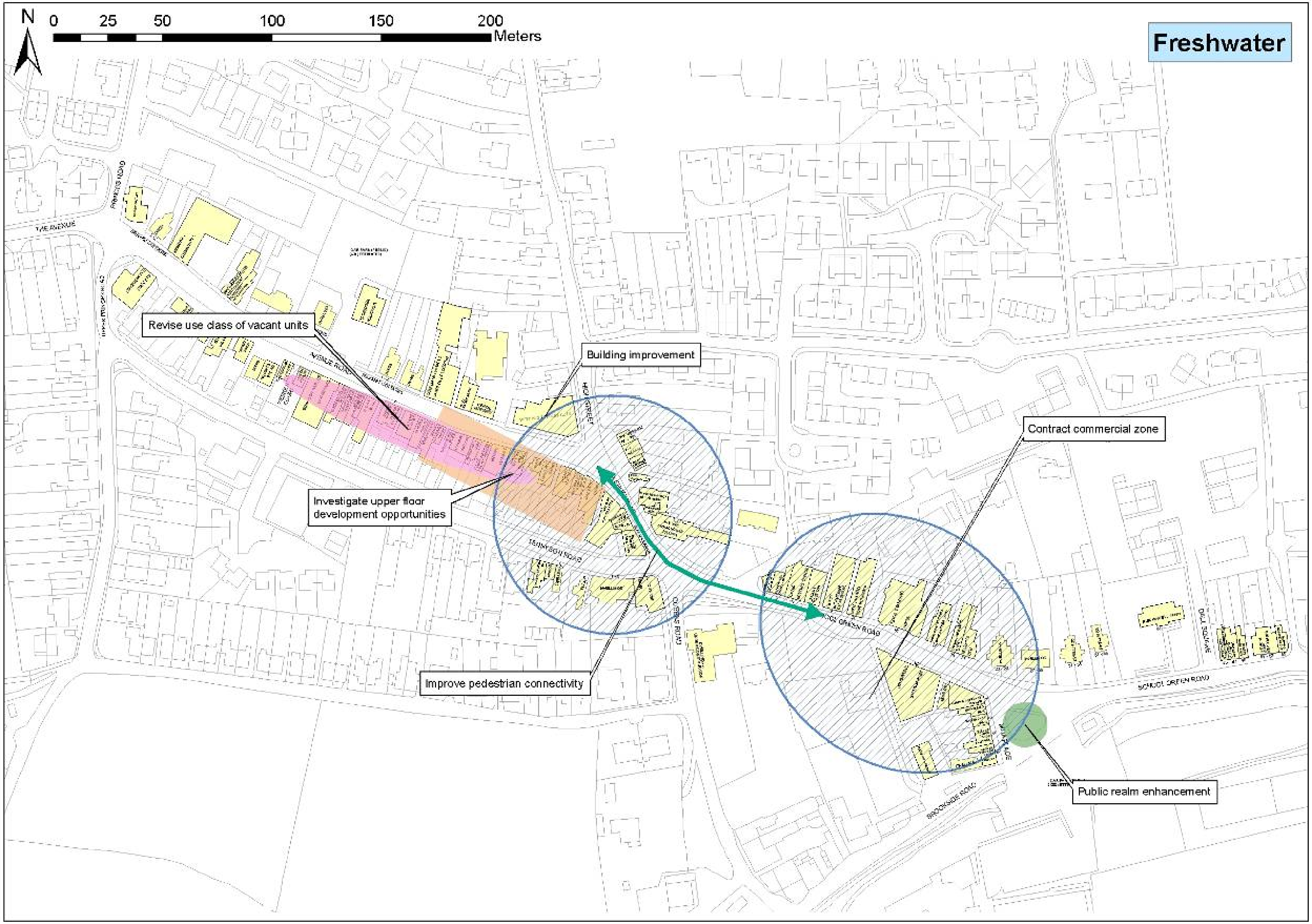
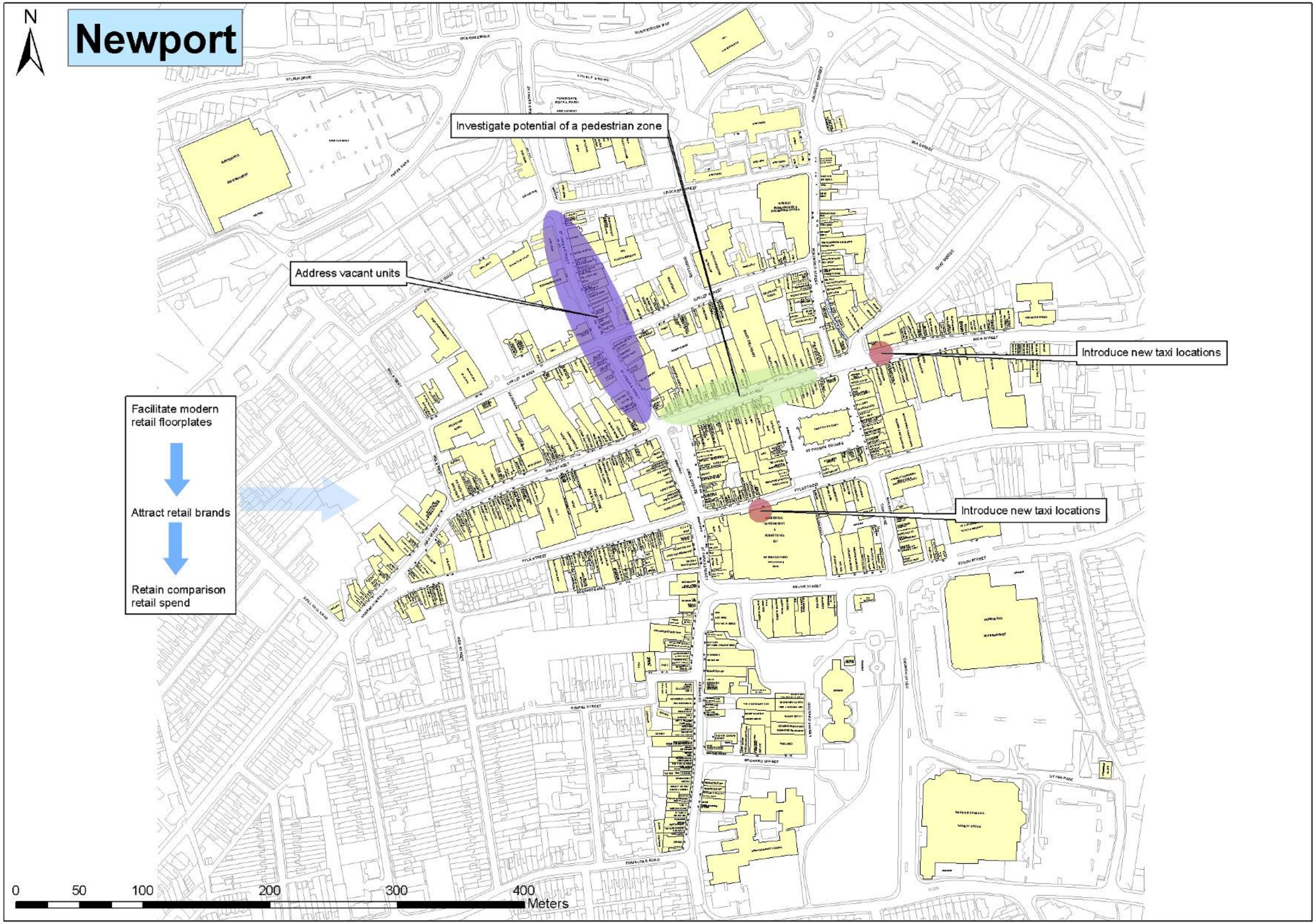
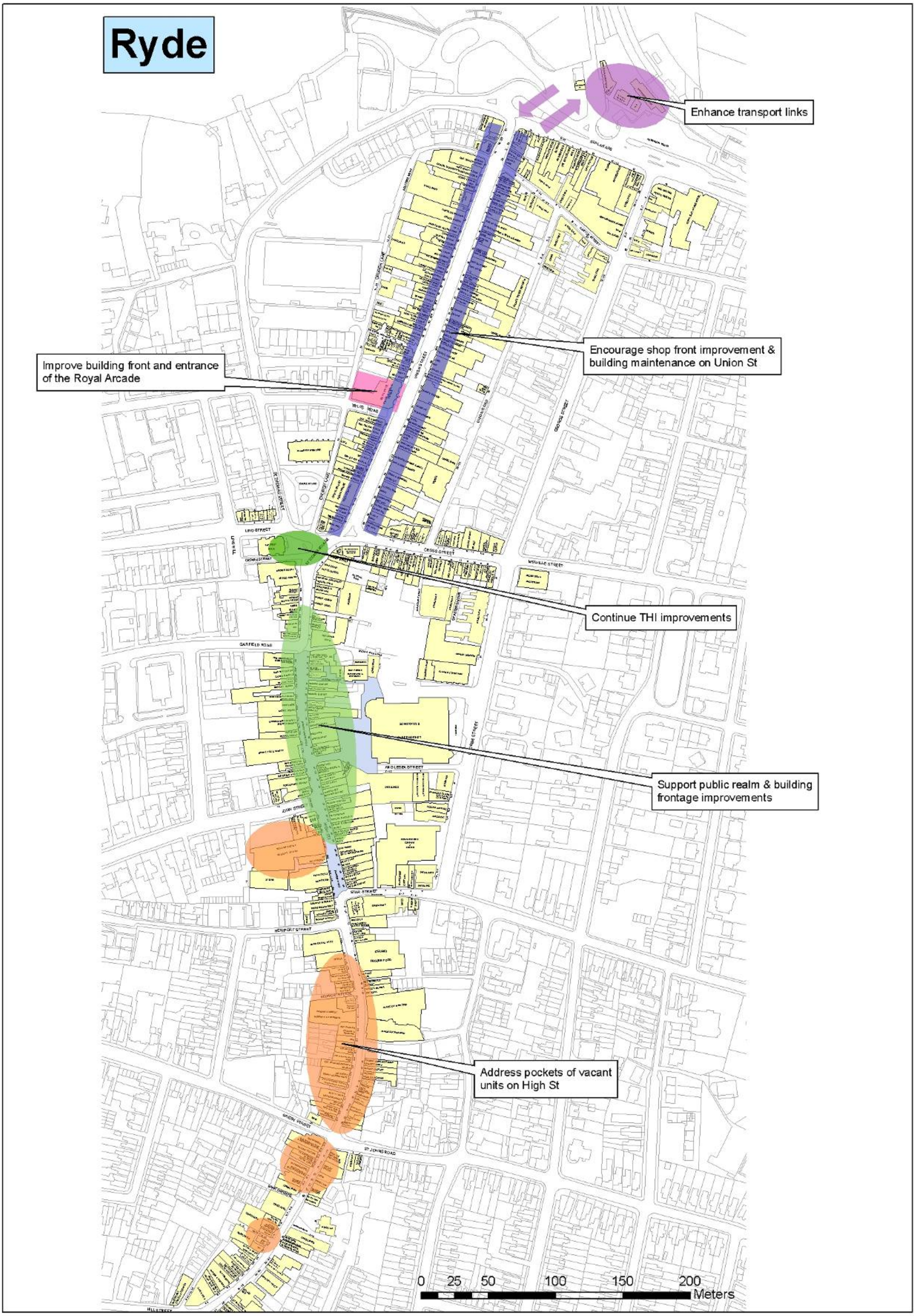
# Appendix 4 –Priority Action Maps

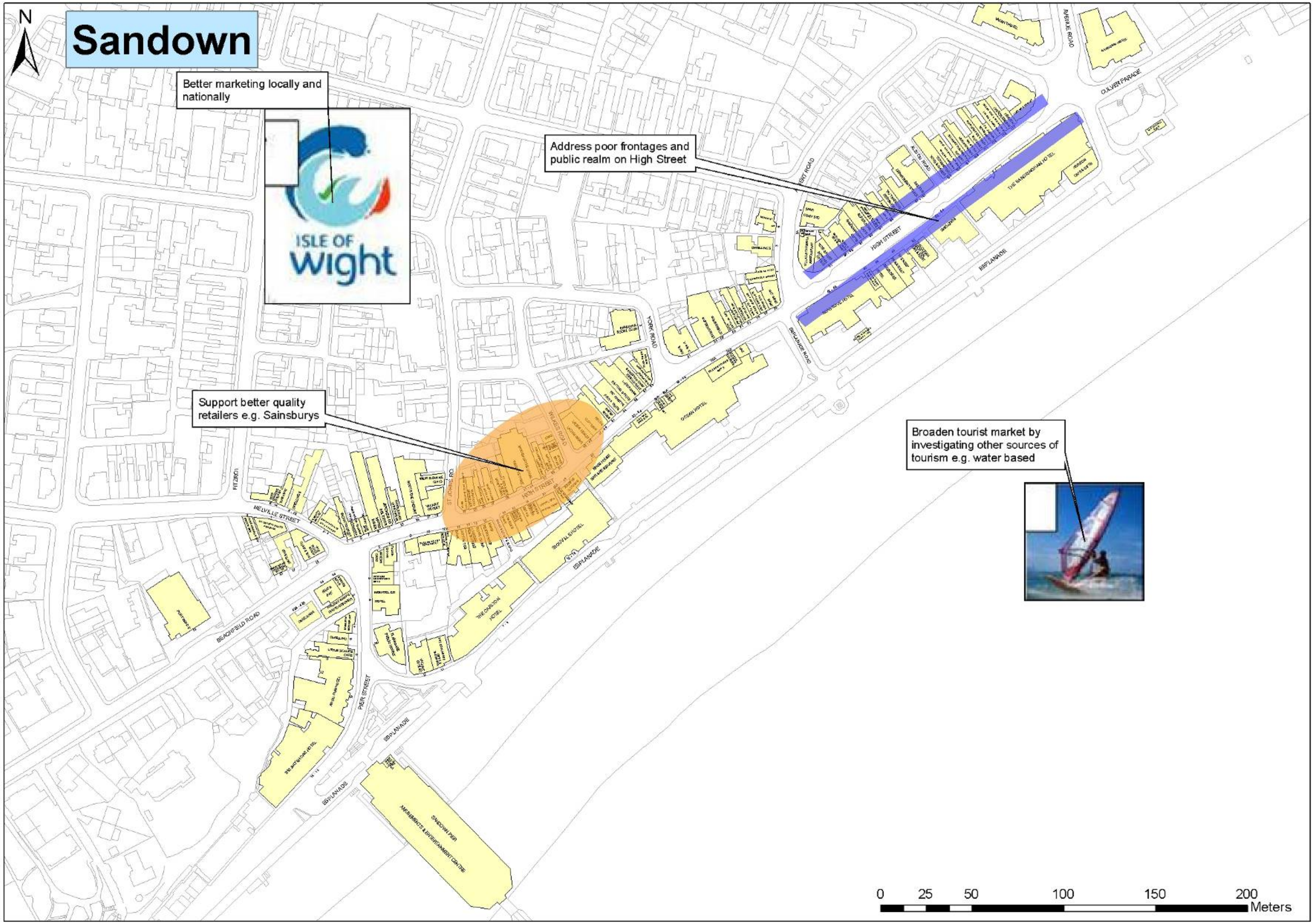

Cowes
N
Improve parking facilities
Building front improvements
Gateway - upgrade public realm of The Arcade
Strengthen nautical tourism
Promote street events
e.g. farmers market and
entertainment
0 25 50 100 150 200
Meters

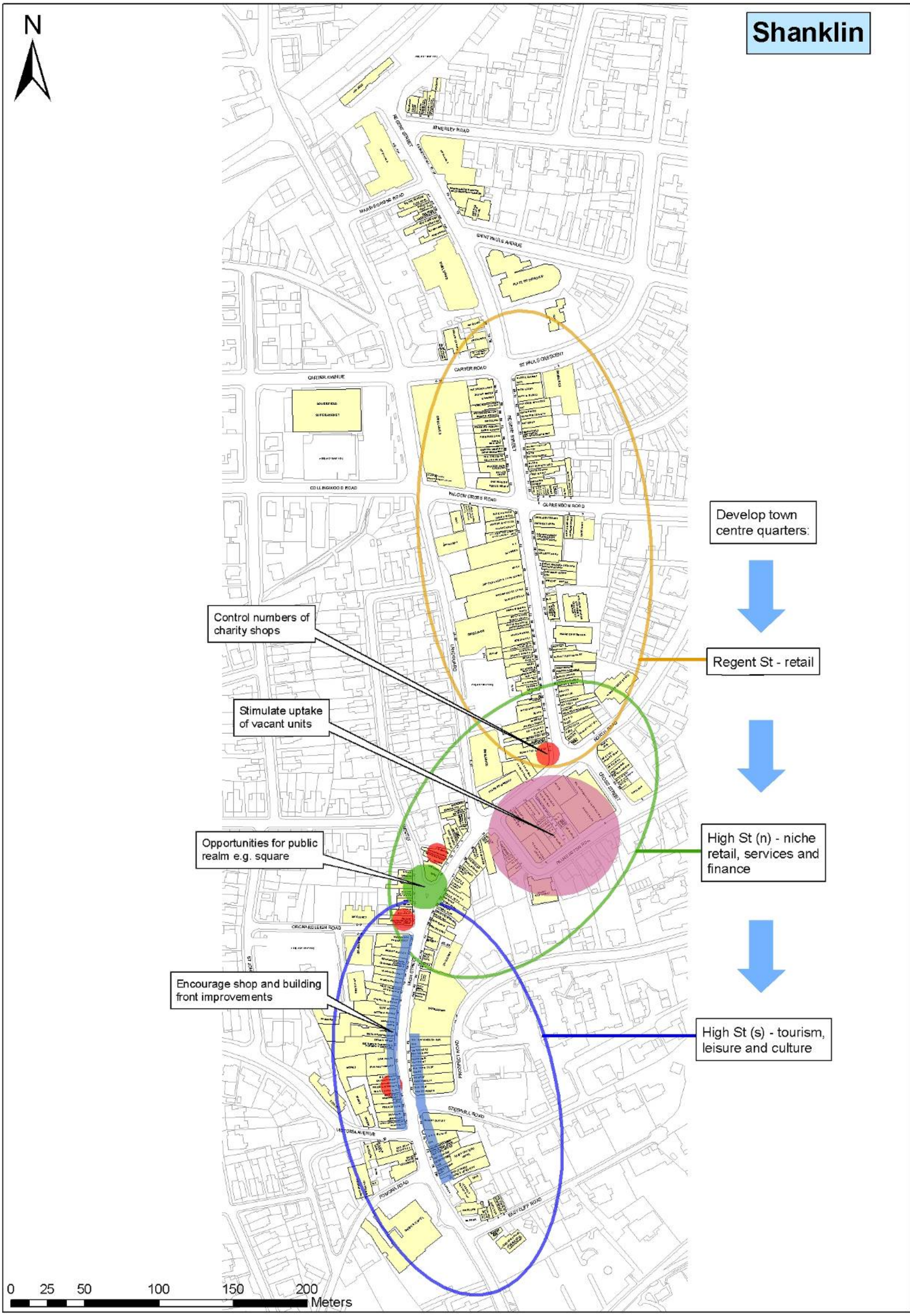

Maximise opportunities from the SEEDA masterplan
Building and shop front improvements
Address transport managment issues related to ferry marshalling
Promote links to the marina and esplande
East Cowes
YORK AVENUE
WELL ROAD
MARSH ROAD
LINK ROAD
FERRY ROAD
CLARENCE ROAD
OSBORNE ROAD
BRIDGE ROAD
BRIDGE SQUARE
CHURCH PATH
Trinity House Depot
Car Park
Spring Villa
War Memorial
St James's Church
Boat Yard
Church Mews
The School House
Club
Community Centre Town Hall and Library
Surgery
Fire Station
Garage
Bucklands
0 25 50 100 150 200 Meters

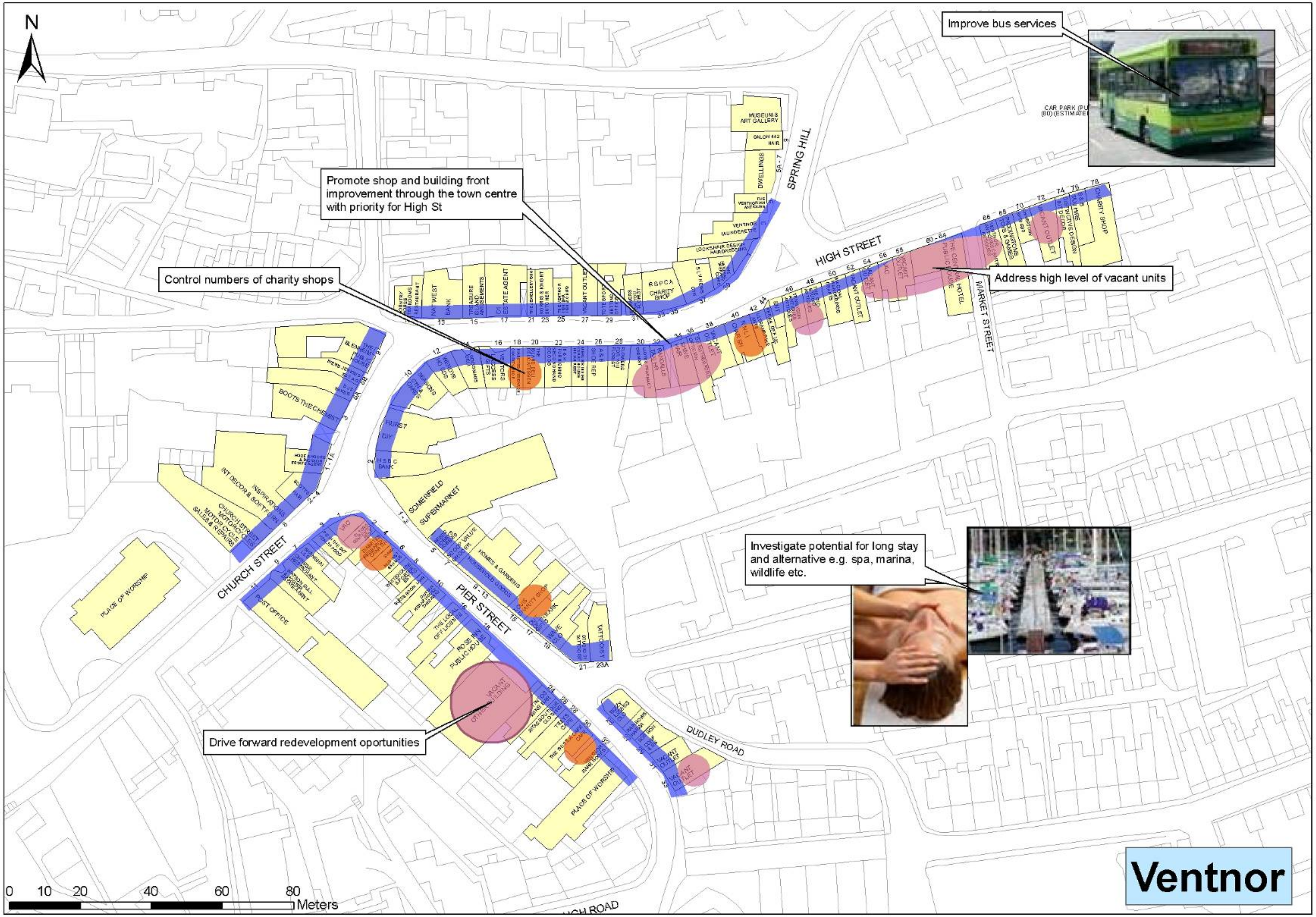

N
0
25
50
100
150
200
Meters
Freshwater
Revise use class of vacant units
Building improvement
Contract commercial zone
Investigate upper floor development opportunities
Improve pedestrian connectivity
Public realm enhancement


N
Newport
Investigate potential of a pedestrian zone
Address vacant units
Introduce new taxi locations
Facilitate modern retail floorplates
Attract retail brands
Retain comparison retail spend
Introduce new taxi locations
0
50
100
200
300
400
Meters


Ryde
Enhance transport links
Encourage shop front improvement & building maintenance on Union St
Improve building front and entrance of the Royal Arcade
Continue THI improvements
Support public realm & building frontage improvements
Address pockets of vacant units on High St
0 25 50 100 150 200
Meters


N
Sandown
Better marketing locally and nationally
ISLE OF Wight
Address poor frontages and public realm on High Street
Support better quality retailers e.g. Sainsburys
Broaden tourist market by investigating other sources of tourism e.g. water based
0 25 50 100 150 200 Meters


Shanklin
N
Develop town centre quarters:
Regent St - retail
High St (n) - niche retail, services and finance
High St (s) - tourism, leisure and culture
Control numbers of charity shops
Stimulate uptake of vacant units
Opportunities for public realm e.g. square
Encourage shop and building front improvements
0 25 50 100 150 200 Meters


N
Improve bus services
Promote shop and building front improvement through the town centre with priority for High St
Control numbers of charity shops
Address high level of vacant units
Investigate potential for long stay and alternative e.g. spa, marina, wildlife etc.
Drive forward redevelopment oportunities
HIGH STREET
SPRING HILL
MARKET STREET
CHURCH STREET
PIER STREET
DUDLEY ROAD
SOMERFIELD SUPERMARKET
BOOTS THE CHEMIST
POST OFFICE
PLACE OF WORSHIP
MUSEUM & ART GALLERY
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Meters
Ventnor

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