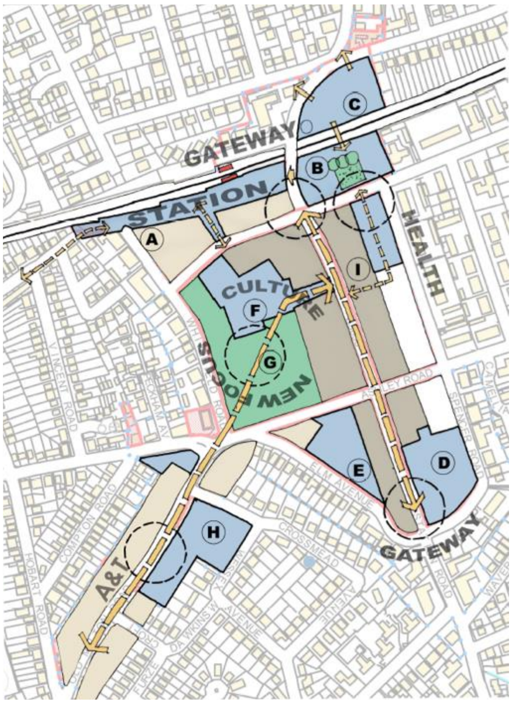
Summary of Study provided by C Wade, People and Places, Dec 2017.

New Milton Neighbourhood Plan; Town Centre Study

Introduction

The New Milton Neighbourhood Plan takes a pioneering approach to sustaining and enhancing the quality of life for residents. It places a strong focus on the town centre as a social, economic and cultural hub. This study seeks to help achieve this by providing insights into the future opportunities and challenges facing New Milton Town Centre by: Reviewing validity of 2010 Retail Study; commenting on current performance; providing planning policy insights; identifying wider delivery opportunities.

Neighbourhood Plan Town Centre Policies



Importantly, the draft New Milton Neighbourhood Plan contains policy specific to the town centre. This policy is divided into four separate parts (NM7A – NM7D) that each focus on a particular type of opportunity. The intention is that the Town Council will work with their partners, developers, landowners, community groups and other relevant organisations to deliver the vision for the town centre. In reviewing these proposals, it seems that there are some particularly key sites in the quest to enhance the town centre's performance and provision for local residents:

Station Road/Spencer Road (Site D) & Station Road/Elm Avenue (Site E): These potential sites at Station Road/Spencer Road offers the opportunity for mixed use development or redevelopment that could boost the town centre and attract necessary new retail and leisure provision. This site could provide for a suitable size and quality of retail floor-space as well as accompanying parking to reinvigorate this end of town alongside the established Bradbeers department store. There is a suggestion in the draft Neighbourhood Plan that such development could be accompanied by the creation of a new public space and include 'shared space' proposals.

The potential redevelopment of public car park nearby between Station Road and Elm Avenue (Site E) merits further investigation and feasibility work linked to this site. Aspirations for this adjacent site include to provide a new retail frontage and public realm to Elm Avenue, residential dwellings potentially; a new multi-story car park. As this land is in public ownership there are greater options for asset transfer and enhancement to underpin appropriate long-term development and management.

Memorial Centre (Sites F & G): Initial proposals for the a redevelopment of the Memorial Centre to create a new multi-purpose cultural facility offers an opportunity to significantly improve the leisure and evening economy offer of the town centre. There is space to redevelop the whole site to provide a community cultural/arts hub which might include a theatre, library and council offices. The aspiration is that by also opening-up connecting pedestrian routes that this will also help re-align the currently linear layout of the town centre; provide a strong focal point and public realm function that is able to play an enhanced role in the life of the town centre.

To maximise the use of this prime location and the viability of proposals in contributing long-term to the town's leisure provision and evening economy, options could include allocating space for commercial activity such as 'family-friendly' cafes alongside cultural provision. As this land is publicly owned there are greater options for asset transfer and enhancement to underpin appropriate long-term development and management.

Town Centre Travel & Access

Pressure on the existing town centre road network seems already set to increase and it will be important that measures are taken to mitigate this and the added pressure caused by proposed housing growth. With no prospect of creating additional road capacity in or around the town, the challenge is to provide realistic alternatives to car trips that service the town centre, station and new housing by walking, cycling and bus services. This may require dedicated bus and cycle lanes on limited road space and perhaps Park & Ride sites and/or dedicated station-bus

Policy NM7C seeks to ensure that town centre in particular is serviced by such alternative travel arrangements.

NM7C Walking & Cycling to the Town Centre: Development proposals, where adjoining an established route, must ensure that the needs of pedestrians, cyclists and public transport users are fully taken into account and that commercial uses can be serviced.

Policy NM8 more broadly seeks to improve accessibility and journey reliability and to enable people to choose how and when to travel and to contribute to the health and prosperity of places.

NM8 Accessibility: Proposals for development or for a change of an established use should offer maximum flexibility in travel modes, including walking and cycling, improve accessibility to services and support the transition to a low carbon future.

Other policies that are supportive in enhancing the town centre's function are: NM7B: Occupancy of New Residential Development in the Town Centre; NM7D: Town Centres Buildings of Heritage & Townscape Value.

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Review of Retail Demand

This current review updates previous forecasts for growth contained in the New Forest Retail Study Update published in 2010 on behalf of New Forest District Council. For both everyday convenience shopping (mainly groceries) and more specialized comparison shopping (typically clothes, electricals and furniture), this review of data projects a reduced local demand over the next 10 years. This is followed by a period of increasing demand as projected local population growth begins to have an impact.

Quantitative Capacity for Convenience Floorspace

CONVENIENCE GOODS Gross floorspace (sq.m.)	2018	2026	2036
2010 Retail Study	1,450	1,990	-
2017 Review	-	550	1,450

The amount of surplus expenditure available has fallen between 2010 and 2016 because of the opening of new stores (Lidl and Morrisons). Gross sales floorspace capacity is calculated to be 550 sq.m. in 2026 and 1,450 sq.m. in 2036. This equates to demand for new store similar to the size of the existing Morrisons by 2036.

Quantitative Capacity for Comparison Floorspace

The following table compares the floorspace capacity in New Milton shown in the 2010 Retail Study with the updated forecasts calculated in this Review.

COMPARISON GOODS Gross floorspace (sq.m.)	2018	2026	2036
2010 Retail Study	2,890	7,240	-
2017 Review	-	1,200	4,430

The retention of comparison expenditure in the New Milton zone is much lower than for convenience goods due to the strength of competing comparison goods facilities in neighbouring towns, particularly Christchurch and Bournemouth.

As a result of the opening of the Meteor Retail Park in Christchurch, forecasts for comparison retail in New Milton have been greatly reduced as this is likely to restrict the potential for an increase in market share. Gross comparison sales floorspace capacity is calculated to be 1,200 sq.m. in 2026 and 4,430 sq.m. in 2036. To provide some context, this equates to a need to accommodate new comparison shopping equivalent to a 41% increase on the currently available 10,690 sq.m within New Milton town centre by 2036.

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Current Town Centre Performance

The benchmarking data for New Milton collected as part of this study indicates a town centre that is currently performing well though where the ability to develop may be currently limited by various factors.

- The vacancy data for New Milton is low (5%) and suggests the town is currently performing well.
- New Milton is busier than similarly-sized benchmarked towns nationally with 101 passers-by per 10 minutes on a market a non-market day.
- New Milton is a moderately difficult place to find a parking space in during the week with 26% of spaces available on a normal day.
- A higher than average proportion of businesses in the town centre are shops (60%), professional and financial services (12%), unique Sui Generis establishments (8%) and non-residential institutions.
- The number of restaurants and cafes (4%) and drinking establishments (1%) are noticeably less than comparable averages for other towns and will limit the evening economy.
- A high proportion of shops are comparison retailers (88%) and it will be important for these shops to have a distinctive offer. The low proportion of convenience retailers (12%) discourages frequent visit and limits footfall.
- The low proportion of key attractors (3%) and other national multiples (15%) will necessitate 'leakage' of customers to other centres. Conversely, the town has a very high proportion (81%) of independent businesses and this could be used as part of a distinctive marketing message.
- An informal observation is that the low level of investment in businesses and focus on an existing, older market may reduce the appeal of the town centre to a new, younger range of customers.

Future Retail and Leisure Distinctiveness

Overall, this benchmarking assessment for New Milton Town Centre identifies that there is a strong representation of retail uses within the town centre and the majority of retail units are occupied by independent retailers. Conversely, this means that there is limited representation from key attractors and multiple retailers. The vacancy rate within New Milton is however significantly lower than in similar benchmarked towns nationally and footfall is relatively high within the town centre. New Milton Town Centre is therefore considered to be a vital and viable town centre, with scope for improvement.

The town centre currently has limited representation from key national multiples who could help drive a marked change in the performance of the town centre. In view of the increased focus of major retailers to focus on prime locations, however, it is evident that New Milton will struggle to attract investment from those retailers, particularly in the comparison goods sector**. It is considered that any future strategy for the town centre should be focused on developing and sustaining a strong independent offer, which could form part of a distinctive marketing message to differentiate New Milton** from other centres, including those higher order town and city centres outside the District.

It will be important to promote the independent offer of the town centre in the face of competition from on-line retailing and higher order centres within the wider area, which could include holding regular cultural / entertainment events to provide an experience and encourage people to visit and dwell in the town centre, which could be aimed at young people / families to attract a younger demographic of visitor to New Milton.

It is evident that the internet and multi-channel retailing will continue to play a fundamental role in the retail sector and will continue to provide challenges, not just for retailers within New Milton but across the country. Digital technology, however, also provides opportunities for businesses within the town and it is important that these opportunities are fully embraced. This could include developing a website for the town centre providing business listings, profiles of existing businesses including links for loyalty schemes for independent businesses, events programmes, maps and transport / parking information.

Moreover, it is important that the overall strategy for the town centre supports the provision of necessary infrastructure to support digital engagement, including, for example, offering support to the integration of click and collect hubs within the town centre. It is also considered that the Town Council could work alongside other town centre stakeholders to look into the potential of providing free public WiFi in the town centre. The availability of free WiFi is likely to appeal to younger users and will enable businesses to market their business, engage with customers using social media, share discounts and offers and find out more about the type of consumers using the town.

In addition, the evening economy within New Milton is extremely underdeveloped with an under provision of pubs, cafes and restaurants. It is clear from recent trends in the retail sector that town centres need to move beyond retail and be vibrant places that people want to visit, including for leisure and recreation, local independent shops, culture, entertainment, business, community uses and public space, as well as their traditional shopping role.

Centres will need to constantly evolve to remain economically vibrant. They need to offer something different from out-of-centre stores and a key component of this will be the provision of a well-developed and high quality food and drink offer, which will encourage people to visit and dwell within town centres. A recent report prepared by Springboard and the NDP Group entitled 'Retail Destinations: The Eating Out Opportunity' identifies that families with children represent over a quarter of total eating out demand and the enhancement of the food and drink offer therefore provides an opportunity to attract new visitors to the town centre.

Planning Policy

The updated National Planning Policy Framework confirms that a range of suitable sites should be allocated to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is considered that the re-occupation of vacant floorspace in the town centre should be the priority in the first instance, with consideration then given to bringing forward sites within the town centre to meet the identified requirement for additional floorspace. To this end, such national policy is supportive of draft Policy NM7A of the emerging Neighbourhood Plan in the way it proactively identifies a range of town centre site opportunities where redevelopment schemes will be supported.

Primary & Secondary Shopping Frontages

The Draft Pre-Submission Neighbourhood Plan 2016-2036 does not provide any specific Development Management policies in relation to the primary and secondary frontages within the town centre. However, the table below sets out a suggested approach based on the findings of this study for consideration.

Adopted Development Plan	Future Policy Considerations
Primary Shopping Frontages	
Policy DM14 confirms the following will be permitted within the primary shopping frontages: a. Retail development b. Appropriate non-retail uses provided the length of ground floor street frontage in non-retail use within the primary shopping area is no greater than 30% of the overall length of ground floor street frontage. c. On upper floors, uses that are compatible with retail use.	It is considered that the adopted Development Plan policy approach outlined within Policy DM14 remains appropriate, as it provides a degree of flexibility to allow non-retail uses within the primary shopping frontages, including food and drink uses, whilst maintaining their predominant retail character.
Secondary Shopping Frontages	
Policy DM15 confirms that within secondary shopping frontages, the following uses will be permitted: a. The development, improvement or expansion of retail and appropriate non-retail uses; and	It is considered that the Development Plan policy approach outlined in Policy DM15 remains appropriate as it encourages a range of main town centre uses within the secondary shopping frontages. This policy approach provides a positive framework to allow A3 & A4 uses within the secondary

b. Change of use of retail premises to appropriate non-retail uses	frontages to help develop the evening economy of the town centre.
Outside Primary & Secondary Shopping Frontages	
Policy DM16 confirms that within the town centre beyond the primary and secondary shopping frontages, development for retail and appropriate non-retail development will be permitted.	It is considered that the adopted Development Plan policy approach outlined within Policy DM16 remains appropriate

Wider Delivery Opportunities and Leadership

The delivery of town centre proposals contained within the draft Neighbourhood Plan requires sustained local leadership and necessary levels of resources to develop and manage the aspects of public benefit at is core. This will involve delivery opportunities that go beyond the planning system to ensure that such proposed changes happen and are sustainable in the long-term.

Town Centre Investment Zones

Town Centre Investment Management and Zones are new concepts that could be suitably pioneering to help deliver appropriate and sustainable development in New Milton town centre. The approach could be applied to a variety of areas of the town centre though would seem particularly suited to Sites D and E where land ownership is in larger blocks and includes public sector car park sites

Town Centre Investment Zones involve the pooling of a critical mass of property assets into an investment vehicle. This allows the stock to be adapted, the mix of occupiers to be curated, the investment to be asset managed and the destination to be more effectively marketed.

The necessary powers and legal structures already exist. Take-up, the report suggests, will depend on the willingness of local councils to adopt a novel and largely untested approach and the ability to marshal different stakeholder groups to agree a common plan.

Asset-Based Development

Asset-based development is an approach to delivering and managing community-owned facilities that could be very applicable to New Milton and the proposed Memorial Centre multi-purpose cultural hub in particular.

Two examples of town centre regeneration projects that tick all the right boxes in successful asset-based development and have developed Arts-based centres are the *Number 8 Community Arts Centre, Pershore* and *Galeri Caernarfon*. Both are iconic buildings that earn their keep within their towns; they are community-owned and managed; both provide a great service that helps bring a place to life throughout the day and especially in the evening.

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Accessibility and Smart Travel

Delivery of appropriate access and travel between the town centre, station and residential areas in New Milton is likely to require increasingly progressive approaches as transport technology and challenges advance. Here we consider the potential role of existing good practice and emerging technology.

Public transport: With good train links and a compact though congested road network, a re-focused approach to public transport could be an important part of making the town centre an accessible hub for existing and new residents. Larger developments should have dedicated public transport routes with direct high quality pedestrian and cycle links to public transport.

Cycling and Walking: Though seemingly low-tech alternative solutions, these two options provide a realistic alternative for short journeys, either alone or linked to other forms of transport. For example, only 2% of people in the UK walk to work compared to 20% in Denmark. In the New Milton context cycling can provide benefits in terms of health, access and convenience that apply to existing and new residents.

Shared Space: Shared Space is an approach to street design where all traffic control devices, markings, curbs and signage are removed. It is an approach that has been suggested for the southern end of Station Road and it will be important to consider the appropriate level as part of a wider access and travel plan in consultation with town centre users and businesses.

Autonomous Vehicles: Vehicles will soon become available which can undertake increasingly large proportions of journeys autonomously. With only 25% take-up Government-backed studies project a 12% improvement in delays, 21% improvement in journey times and a near 80% improvement in journey reliability.

Smart Parking: Technology is already in use that offers directions to spaces; 'invisible' payment; variable tariffs according to demand; and linked discounts for loyal customers. Over the next few years this technology will become easier to use and better integrated. This is where 'quick wins' can happen to differentiate New Milton as a destination by improving convenience, costs and congestion.

Vehicle Sharing: This covers different ways a car can be shared by users. Taxi pools and car clubs in particular have the potential to grow first where there are the necessary number of 'early adopters' and local promotion to make the services viable.

Intelligent Mobility: This is the hidden innovation that will be behind so many improvements to transport service in and between our towns and cities. Think of intelligent mobility as a joined-up service focusing on the 'software' rather than simply the 'hardware' of cars, trains, roads and rails. Government-backed research estimates that the UK Intelligent Mobility market will be worth up to £56bn per annum in future.