Didobi

ISLE OF MAN

TOWN AUDITS

An independent research report by Didobi - January 2024

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EXECUTIVE SUMMARY

The Isle of Man is unique in terms of its location, status as a Crown Dependency, its population, economic growth drivers, political structures and governance. This of course makes it a challenge to be able to draw direct comparisons with the UK. An example of this is the feedback we had that some stores in Douglas have higher sales densities than stores in larger cities in the UK. The significance of this is that the store in Liverpool has a city population of 466,000 and the population of the Island is 84,000!

During the course of this project we have analysed, reviewed and collated significant data along with previous reports written and engagement studies undertaken. We visited all of the audit locations on the Island and have met with a number of key stakeholders from Isle of Man Government officers to town and village Commissioners, businesses, residents and property professionals.

We believe that having a clearly articulated vision that engages the emotions, desires and dreams of a place and its people is key. It is something that we feel could be better articulated across all locations, with the exception of Castletown, and linked to the 'Our Island Plan 2023'. There appears to be competition between the towns, such as holding events on the same days. Greater co-ordination would lead to wider benefit to all in terms of attendance and resulting spend for local businesses. Whilst the Isle of Man is best known for the TT races there are many other reasons people should be visiting the Island.

Towns and villages require strong leadership alongside a vision and plan. A lack of leadership in towns is a common issue across the UK and the balance between community and council leadership can be a challenge. Castletown has the strongest leadership and execution of a plan that we came across and it is an approach and model that should be replicated elsewhere. Tying into the concept of the '15 minute city' where local needs are met is key to retaining and attracting residents and workers. The fact that we were unable to meet any leadership group in Peel is a concern, especially with the back story of failure to agree on funding opportunities previously available.

The role of the Isle of Man Government is very unique in terms of its ownership and control of key transport assets, property and land along with being the sole source of grant funding. This level of control means that the relationship between the government and towns is important in terms of collaboration. This collaboration must extend to partnership working with other key stakeholders such as landlords, businesses and developers. The fact that the Island is considered as 'offshore' by UK institutions means that access to institutional capital is limited and there is a heavy reliance on private investors and developers who typically seek higher returns than traditional long-income pension funds. This increased expectation of returns is a challenge for the Island especially when the cost of construction has been quoted as being 25% higher than in the UK. This creates an investment and return shortfall that someone needs to address. That might have to be the government in underwriting strategic developments where economic returns might be low but social impact is considerable. We sensed a degree of frustration between developers and the government and hence why we have suggested closer collaboration through a body chaired independently by someone not from the Island. The Manx Development Corporation is a step in the right direction but it must be prepared to address the most challenged high social impact sites and not compete with the private sector on the more viable development sites.

Douglas, as the capital, lacks some key attributes such as a public square, adequate parking provision and the level of retail and leisure offer that one would expect from a capital. Douglas is the key economic driver for the Island's economy so having the right mix and quality of real estate and infrastructure is critical to the wider Island's success.

The seasonal nature of visitors is an issue for the Island. We believe there should be more initiatives to attract tourists in the off season. This could be through reduced travel and accommodation promotions linked to events, the natural offer of the Island such as dark skies and its UNESCO Biosphere status along with activity holidays.

Maintaining a town centre first policy in terms of retail development is important. This is an issue for the future success of Ramsey where former industrial buildings could offer a shopping experience. Of note was Tynwald Mills, not listed as a centre, however it appears to be a successful out of town retail development. Investment in several decaying Victorian buildings across a number of towns needs to be a priority in order to improve a sense of place and create important commercial and residential accommodation. Combined with a wider programme to encourage business start-ups from the Island and UK, this space could be for business incubation or affordable residential property and therefore enabling an increase in population and economic activity.

In conclusion, the Island's city, towns and villages face the same challenges as those in the UK in terms of the changing demand of retail and office space, the need to retain and attract talent and the need to create homes for people at different stages of their life and with different budgets. All of these factors have to be encompassed in a strong vision and plan that is integrated with infrastructure and services, and funded with a view to measuring the economic, social and environmental impact. In some instances, the social impact may need to override short-term economic returns. The Isle of Man government has recently recognised and started to approach these challenges but to achieve success it must be complimentary to all towns and villages on the Island who are clear about their vision and alignment to the wider Island Plan.

INTRODUCTION

In November 2022, the Isle of Man Government launched their 'Our Island, Our Future' 10-15 year economic plan. It included aims to grow the population to 100,000 by 2037 and create 5,000 new employment opportunities. Since its launch, there has been a general trend of population growth, 1,500 new jobs created and and income tax receipts estimated at £40m ahead of what was budgeted.

This plan is set to be supported by a Local Economic Strategy that will focus on the hospitality, retail and leisure offer to help make the Isle of Man a more competitive, vibrant and sustainable place to live and work.

The 'Town Audits' report presented here is based on work carried out in early 2024, which will help support the evidence base to drive this strategy and define the future ambitions of local towns.

It starts from a position of relative strength with an increase in holiday makers over the last year and a strong tourism campaign helping to promote the Island. However, like many places, much of the Isle of Man is still recovering from the pandemic. In a survey carried out by the Isle of Man Chamber of Commerce in 2022, 35 per cent of members said they had seen a "major" cut in income compared to 2019.

So, while there are clearly opportunities to capitalise on a new wave of wellbeing tourism, and there are also growth opportunities in industries like the financial and technology sectors, there are also challenges for businesses and a need to strengthen the identity of towns and improve their offer.

This report seeks to identify where those gaps are and offer recommendations to improve the towns and villages creating more vibrant places on the Island.

APPROACH

This report is a result of several concurrent research and engagement activities. These were;

A review of all recent reports, research, data and surveys.

Primary data collection and analysis of all retail and leisure units in each of the eight locations (Douglas, Ramsey, Peel, Castletown, Onchan, St Erin, Port St Mary and Laxey). This is now available via the Local Data Company's online dashboard Local Data Online https://localdataonline.com/Account/Login.

Collation of data to feed into the creation of an Understanding Manx Places based on the methodology of Understanding Scottish Places (www.usp.scot).

A visit to the Island by the Didobi team where each centre was visited and local stakeholders, businesses and residents were spoken with.

Telephone interviews with key developers and investors.

At the end of the project we then use the Place Standard Tool (www.ourplace.scot) to evaluate each location based on our views from the research. The Place Standard tool provides a simple framework to structure conversations about place. It allows users to think about the physical elements of a place (for example its buildings, spaces, and transport links) as well as the social aspects (for example whether people feel they have a say in decision making). It has 14 themes, each with a main question and further prompts to support conversations, inform the assessment and identify issues for improvement.

UNDERSTANDING MANX PLACES

Introduction

As part of the work on thinking about town centres on the Isle of Man a background section on the social, demographic and economic characteristics of places was conducted for the eight town and village locations.

The approach used is akin to that used to understand Scottish places (www.usp.scot). It is important to outline a few points concerning the use of this approach.

Firstly, the approach is designed to encourage people to start conversations between places. To ask good questions it is important to have data which enables the user to think about similarities, differences and unexpected findings. These offer the possibility for sharing of ideas about how to continually evolve and improve places and inform discussion about the likely impact of different projects. Examples might be: does the place have the social capital to undertake projects? Which places share similar problems? What would strengthen social connections?

Secondly, it is not the purpose of the approach to create league tables as it is about synergy rather than competitiveness.

Methodologically 'Understanding Scottish Places' used two specific approaches:

The first engaged with clustering places which were the most similar to each other across a range of social, economic and demographic variables extracted from census data.

The Scottish case had over 400 towns to consider. The Isle of man has eight. Clustering has been used here in order to help identify common features and add a layer of understanding across the variables which might not otherwise be achieved. Data has been used from the 2021 census on the Isle of Man. The variables differ from those used in Scotland as a result of differing census questions and availability of cross tabulated data. Nonetheless the same types of characteristics have been included – age, education, deprivation, housing tenure, household size.

The second approach developed an interdependence model to understand the relationship between places. Data was collated on service provision to identify places which were, independent, interdependent and dependent. The breadth of data used in Scotland is not replicated for the Isle of Man, but a selection of key indicators has been used to establish levels of dependence, interdependence and independence. Again, these can be used in thinking about the potential for different types of investment in places.

From the statistical data published on the Isle of Man it is clear that geographical understanding at a sub-Island scale has not been a priority with few sub-national tables being published. The size of the Island, its population and short distance between settlements arguably produce less variation compared with the Scottish model. However, the challenges facing town centres always require local evidence-based data to be used.

A recent report by CACI applied Acorn methodology to the various towns and villages on the Isle of Man. It identified categories, including those based primarily on likely spending patterns, defining groups on potential cultures of consumption. This is very different from the approach of this project. It has been widely recognised that the future of town centres depends on community and social capital as much as on potential wealth. Making places requires an understanding of how places relate to their communities and each other if places are to be strengthened and made better. There is also another issue; the issue of scale. The Isle of Man has just over 84,000 people in total, which is a comparatively small population in terms of likely total expenditure regardless of income levels and regardless of the relative spend on and off the Island. This is noted as the CACI report makes several suggestions of town comparators in England. Similar locations were quoted as Canterbury, Chester, Tunbridge Wells, Brentwood, Chichester, Falmouth and Windsor with the larger destinations of Cambridge, Cheltenham, York and Lincoln cited for wider context. It is important to note that these towns mainly exceed the total population of the Isle of Man and with the exception of Falmouth far exceed the populations of any of the towns on the Isle of Man. It is understood, however, that certain comparisons are important for targeting particular retailers in helping them understand the potential spend characteristics of the population.

The clustering used in Understanding Scottish Places identified similar places but usually within similar size brackets as well as other characteristics. Scale matters not only for assessing the potential of town centres but also in the wider articulation of these places. It is therefore stressed that the approach in this report is more suited to thinking about the future of town centres and how the town and village centres on the Isle of Man can reach their potential and prosper in the future as places in which people identify with and feel at home in.

The report includes some Scottish towns which might offer potential for sharing ideas. In the analysis the clustering model and the interdependence model are data driven rather than a pigeon-holing approach. This makes the Scottish comparators tricky to identify but, given the similarities of the variables, the selection would seem at least to provide a starting point for sharing and talking about town and village centres.

Figure 1. STP town overview (Source www.usp.scot)

APPLYING UNDERSTANDING SCOTTISH PLACES (USP) TO THE ISLE OF MAN: AN INTRODUCTION

Conceptual Basis of USP

Towns Geographies

In places like Scotland, local councils are normally the key decision makers in public policy and think in terms of council regions. Towns have been neglected as a geography and there is usually no mechanism for town specific policies, funding or administrative responsibility. Towns are where people live. They are the context which shapes place identities and the well-being of those who live there. They are spaces which create communities. USP sought to refocus attention towards towns.

Provide a consistent evidence base for towns in Scotland

Towns are complex networks and making sense of them requires an evidence base for decision making. Too often decisions have been made with no real appreciation of what makes towns work. Context is critical and the evidence base is key. Knowing what works in different contexts matters.

Starting Conversations

In an environment where funding sources and public expenditure are constrained there is a need to understand how to develop solutions which will make an incremental difference. Getting people together who have common problems and similar potential is key to determining how to bring about change to make places better. The clustering methodology suggests groups of places which are similar, although sometimes with unexpected results, but always offering a starting point for thinking about places, sharing ideas and imagining new futures.

These concepts have wider application. There is always scope for starting conversations and the more informed these are, the less they rely on preconceptions and the more they reflect common problems the better. The Isle of Man is no exception.

Methodological Considerations

- **Clustering**

The clustering model permits the grouping of towns on the basis of a range of similarities. It is important to stress that the cluster characteristics are privileged above the specific town characteristics as these highlight the things that make places similar or different. There will always be differences, but it is important to have a way to assess which things are significantly similar or different. The Understanding Scottish Places methodology uses K means clustering to achieve this. Variables included age characteristics, education, activity/employment, housing tenure, deprivation, car ownership and household size.

- **Interdependence**

It has often been assumed that towns are the sum of their location, history and size. The interdependence model permits much greater understanding of relative positioning and the potential impacts of different policy decisions about how places rely on each other. Variables included health, education, workplace/job location, retail provision and social capital.

Both methodologies have relevance in the Isle of Man as current interdependencies and current cluster differentials are not fixed but open for negotiation and new futures.

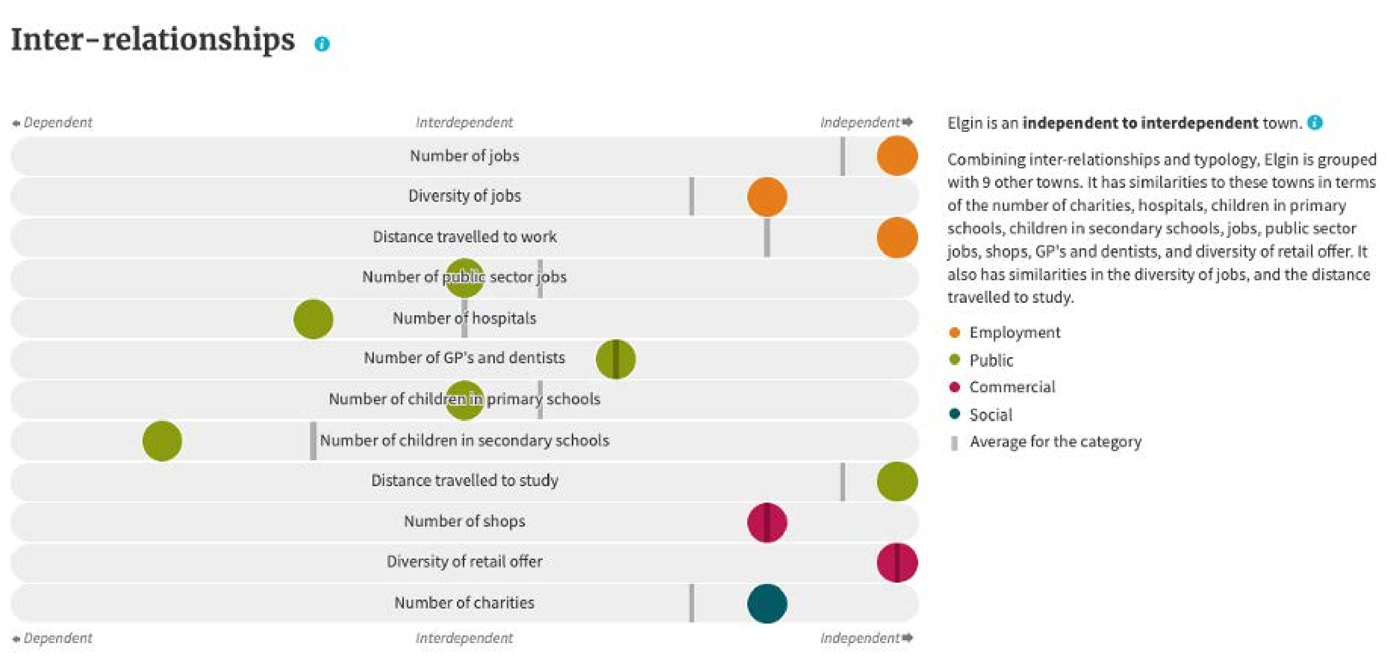


Figure 2. USP town interrelationships (Source www.usp.scot)

SCOTTISH USP IN AN ISLE OF MAN CONTEXT

One aim of this study was to find similarities between towns on the Isle of Man and in Scotland using the Understanding Places approach.

A recent report by CACI applied Acorn methodology to the various towns on the Isle of Man. It defined towns on potential consumption patterns. The Understanding Places approach recognises that the future of towns and their town centres depends on community and social capital as much as on potential wealth.

The clustering used in Understanding Scottish Places identified like places and then grouped these into different size categories. Scale matters not only for assessing the potential of town centres but also in the wider articulation of these places.

In many ways the Scottish examples offer a more meaningful perspective than the comparisons in the CACI report, if with some important caveats. The relationship between rural and urban places is different in Scotland from England. Place identities are also particularly important in both Scotland and the Isle of Man. There are also issues of remoteness in both.

There are some obvious differences between Scotland and the Isle of Man from a USP perspective. There are only eight towns to consider compared with 479 in Scotland. Additionally, Island context and political status make the Isle of Man very different. The geographic distances are much shorter between places with Douglas accessible from all parts of the Island. No island towns in Scotland had comparable populations with that of Douglas.

From the statistical data published on the Isle of Man it is clear that geographical understanding at sub-island levels has not been a priority with few sub-national tables being published. This did limit the choice of variables for the present application of the clustering and interdependency models. Town geographies matter just as much in the Isle of Man as in Scotland and arguably the nature of town groupings is more similar.

USP is a data driven approach focussed on how a set of towns relate to each other rather than being defined by an external typology. This makes it harder to decide which places in Scotland are similar to places in the Isle of Man and Scotland. However, some suggestions have been made. These are based on the town size, cluster characteristics (converted into a word set in the introduction to each town) and on the interdependence model results. It should be noted that in the model alongside the headline town there are suggested groups of towns. Some similar places might be intuitive, others less so. Hopefully either way the linking of places will stimulate useful dialogue and thinking about these places.

An Understanding Places approach is about making places better. Private sector decisions such as retail developments are only one part of the wider story. USP was very careful in its structure to avoid it becoming a league table or a measure of how poor or rich places are. Those wishing to make investment decisions about private developments should recognise this difference and focus on the benefits of understanding context when using an Understanding Places approach.

DOUGLAS

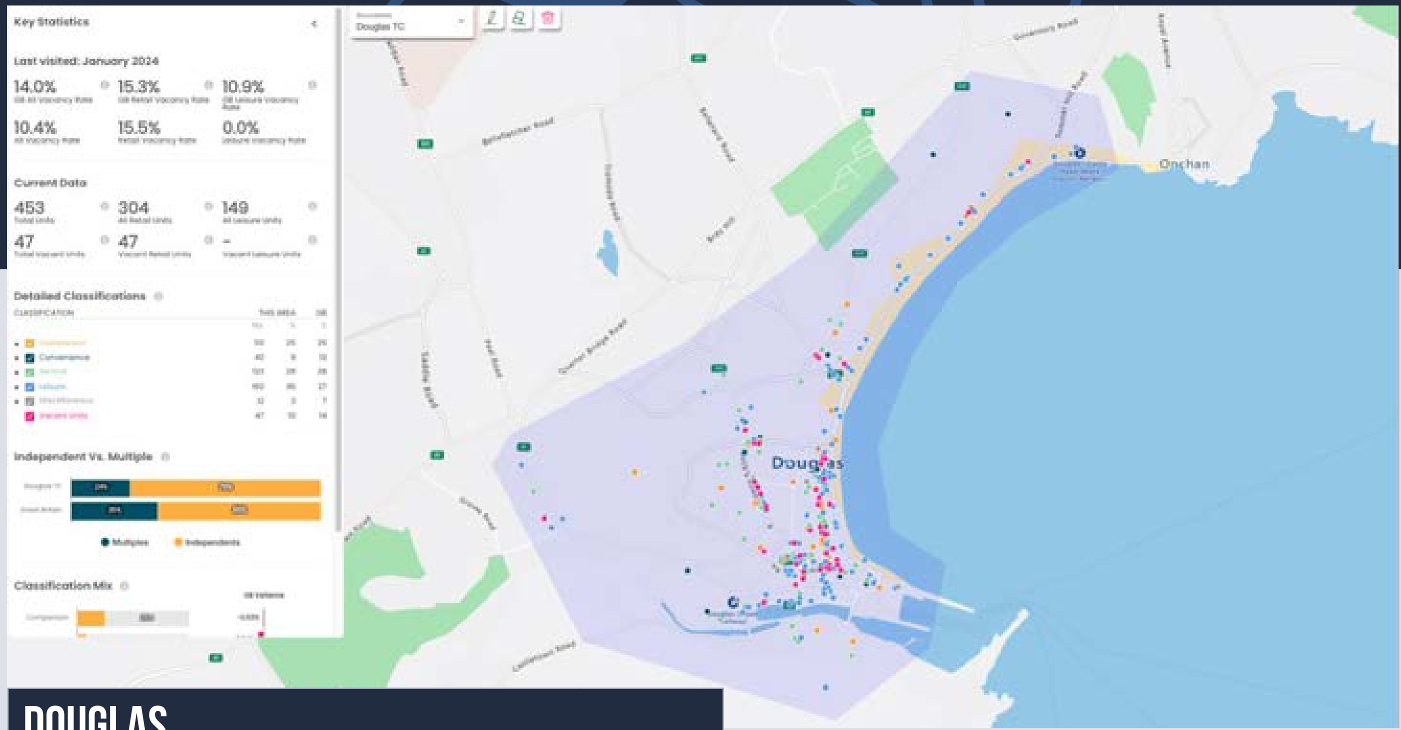
This is the capital city of the Isle of Man, home to the Manx Government and the largest settlement on the Island with 32% of the Island's population at 26,677[1].

Unlike the other town and village audits, the review of Douglas focuses on its offer in terms of retail, food & beverage (F&B) and leisure. It builds on recent studies and surveys that indicate an aspiration for certain brands of retail and F&B found in major urban centres in the UK.

The core retail / leisure area runs from Broadway / Harris Promenade at the northern aspect of the central core to North Quay at the southern aspect of the core area with Loch Promenade to the eastern edge and Market Street to the western edge.

Another area of retail and F&B activity is along Woodbourne Road and Bucks Road. Off the main pitch to the north along the Central Promenade is the Palace Cinema.

[1] https://www.gov.im/media/1375604/2021-01-27-census-report-part-i-final-2.pdf



DOUGLAS	
Retail and Leisure Units	453
Retail Units	304
Leisure Units	149
Vacant Retail and Leisure Units	47
Vacant Retail Units	47
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	10.4%
Retail Vacancy Rate	15.5%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	110
Convenience Retail Units	40
Service Retail Units	123
Leisure Units	160
Population	26,677
Population to Retail and Leisure Units ratio	59

UNDERSTANDING MANX PLACES

Douglas is a large town. It is the main port and as the administrative centre for the Isle of Man. It has a higher working age population than towns in other clusters. Also, a higher proportion work full time. Socio-economically the population is mixed with some deprivation and mixed educational attainment. A higher proportion live in private rented property and there is a higher proportion of single person households than in other clusters.

Douglas is an independent town. A similar Scottish town is Elgin - https://www.usp.scot/Town?mainTownName=Elgin and on the Isle of Man is Ramsey.

Figure 3 (Top). Douglas overview on Local Data Online (Source Local Data Company)

Figure 4. Douglas retail and leisure units overview (Source Local Data Company)

Figure 5. USP interrelationships classification for Douglas

Existing Offer and Amenities Retail

The core retail offer is on Strand Street, including Castle Street to the north and Duke Street to the south (linking to North Quay).

A range of UK national / multiple retailer operators exist alongside independent Isle of Man originated businesses with a varied local F&B offer all currently anchored by Marks & Spencer (M&S), Next, Flannels and TK Maxx.

The recent Local Economy and High Street Survey[2] shows an average score of 3.18 out of 5 for a range of indicators from opening hours, appearance, accessibility, atmosphere, and variety of offer. Variety scored the highest at 3.58. This score does reflect the wide variety that is on offer, which is not necessarily obvious from first impressions. This is reflected in the further data from the survey that contradicts the data summary with 64% of responses considering that the overall variety of offer is poor. Spending time on Castle Street and Strand Street brings home the range of the retail offer. Extracts from the survey are reproduced below.

Our review found the appearance of the main shopping street does need improvement despite the recent public realm improvements. There are a number of buildings that need maintenance to their external facades to reduce the current drab appearance that impacts on the attractiveness of the street. This is in contrast to buildings such as Tower House, which although inviting from the outside, has little to offer inside.

The 'Gateways' to the main retail area are poor in appearance at both the north and south entrances. The northern entrance to Castle Street is unappealing and the buildings in the vicinity do need improvements to their facades and shop fronts. To the south, the Henry Bloom Noble Public Library building is not only uninviting itself but presents a poor image to the shopping street entrance at Duke Street.

How would you rate the following aspects of Douglas's retail areas out of 5?

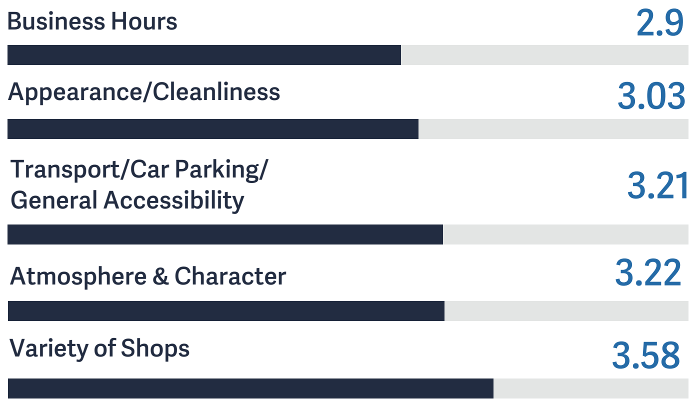


Figure 6. Local Economy and High Street survey 2023 (Source IoM Enterprise)

How would you rate the following aspects of Douglas's retail areas?

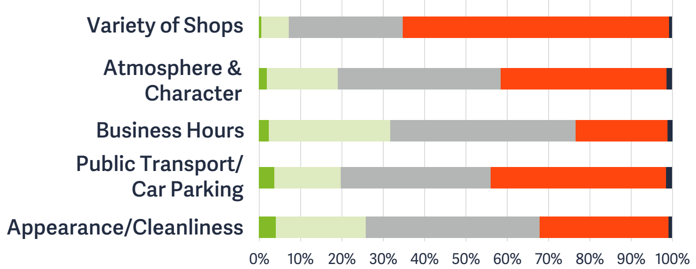


Figure 7. Local Economy and High Street survey 2023 (Source IoM Enterprise)

[2] https://www.iomdfenterprise.im/business-test/news-events/isle-of-man-local-economy-and-high-street-survey-2023/

Figure 8. Poor quality buildings on Castle Street / Strand Street (Image – Didobi)

Accessibility is good with ample public transport connections along Victoria Street and Lord Street and car parking provision with the Chester Street and M&S car parks.

The streets have character with a range of architectural styles. However, the building quality does need an upgrade and regular maintenance.

The overall variety of the retail offer is good, and while there would seem scope for improvement, the anecdotal evidence from shop keepers suggested trade was good and that in some cases the stores were over trading (i.e. more customers / business that expected or has the capacity to satisfy).

Most shop units on Strand Street and Castle Street are in older small floor plate buildings. In our opinion, this may inhibit some UK chain retailers from taking space and this opinion was supported by one building owner on Strand Street.

Food and Beverage (F&B)

There is a good variety of restaurant and bar outlets throughout the core area of Douglas with a concentration around the vicinity of Duke Street, Victoria Street and North Quay. Chains such as Nando's, Yo Sushi and Turtle Bay as mentioned by survey participants[3], are not present. However, with the potential of developments in the Fort area (as characterised in the 2014 masterplan), chains or chain franchise options may come forward. The challenge will be development viability given the capital requirements and rent-free periods demanded by the operators in addition to additional development overheads due to transportation costs etc.

Leisure

The city centre lacks a commercial experiential leisure offer in the form of a multiplex cinema, food and leisure complex linked to the retail core. Villa Marina comes close to that offer; however, it does feel cut off from the retail area despite only being a short walk away possibly compounded by the poor 'gateway' to Castle Street at Church Road Marina, mentioned above. The existing offer comprises the National Sports Centre, the Villa Marina Complex, health clubs, gyms, dance clubs, parks, golf, climbing walls, museums, steam railway, cricket club, theatre and cinemas.

[3] https://www.iomdfenterprise.im/business-test/news-events/isle-of-man-local-economy-and-high-street-survey-2023/

Alignment of offer to achieve sustainable population growth

Douglas has easy and fast access to the coast and to rural areas to the north, west and south while also being the main port and business centre with easy access to the airport making it an attractive place to both live and work. However, the perception from the recent local economy and high street survey[4] together with that recorded in the KPMG report[5] is that the retail, F&B, and leisure offer is poor compared with UK large urban areas. In terms of keeping the existing young population while also attracting younger, skilled, and economically active individuals and families who are used to the offers from larger urban areas, this issue does need addressing despite the challenges presented in terms of catchment and logistics on and off the Island.

Culture and arts activity in places such as Peel and Port Erin would appear to be slightly stronger than in Douglas. There is Kensington Arts providing a range of arts-based services and a sales based fine art gallery on Victoria Street, however for a place the size of Douglas with its capital status, work should be done to analyse the potential 'gap' in provision and what can be done to overcome this subject to demand studies. This is something that the Isle of Man Arts Council could work on together with the Department for Enterprise.

Feedback from the younger demographic in the Local Economy and High Street Survey[6] included a desire for more focus on history and culture, more live music, and entertainment. These are aspects that can be drawn from a thriving arts and cultural scene.

So, currently there is a gap between the present offer and the wider vision and aspiration for both Douglas and the Isle of Man. The arts and cultural activity should be seen as part of the cultural industries and linked to creative businesses with opportunities in digital, audio, and visual.

[4] https://www.iomdfenterprise.im/business-test/news-events/isle-of-man-local-economy-and-high-street-survey-2023/
[5] https://www.gov.im/media/1377114/our-big-picture-phase-1-part-1-report-final-public.pdf
[6] https://www.iomdfenterprise.im/business-test/news-events/isle-of-man-local-economy-and-high-street-survey-2023/

Opportunities in relation to national vision and strategy for the Island

The key development opportunities have been identified in the Central Douglas Masterplan[7] of 2014. Although now 10 years old, this masterplan document is still relevant (with some minor adjustment) to the aspiration for the improvement of the city centre related to the development opportunities that exist.

The masterplan discusses improvements to Market Street and Chester Street Car Park. The environment and public realm of Market Street needs improvement at strategic locations where there is a strong connection to Castle Street and Strand Street. The opportunity to make use of the former M&Co unit and the supermarket unit under the car park should be considered in terms of leisure and retail creating a small retail circuit with the main shopping streets. This will also require public realm improvements to the various side streets linking Market Street with Strand Street. Such improvements will help with the overall appearance and attractiveness of the area.

The current plans for the mixed-use development on Villiers Square and Lord Street are the strategic catalytic developments that will positively impact the current challenges and aspirations for the high street.

Villiers Square with new, modern ground floor retail and F&B units, could attract some of the brands desired for the Island. In addition, the F&B and leisure / cinema plans for the Lord Street development will also address current demand issues. However, the size of catchment, logistic costs, current cost of capital, tenant incentive packages and expected investment yields will all put pressure on development viability. Therefore, new partnerships with the public sector and now with an opportunity to create partnerships with the Manx Development Corporation should be investigated to deal with viability gap issues and the range of joint venture models that could be created to bring forward development.

[7] https://www.gov.im/media/1346921/central-douglas-masterplan-final-version.pdf 2014

Figure 9. Douglas High Street – Strand Street (Image Didobi)

The Muckles Gate / Cambrian Place site, between Fort Street and Lord Street also needs bringing forward. Earlier plans for a new library, office, and car park, should be revisited but this time looking at a new library / innovation centre with the office element being a linked innovation hub possibly working in partnership with the University College Isle of Man and their Learn 4 Life programme[8]. With digital skills and digital based industry already a mainstay of the economy and the growth of digital and artificial intelligence (AI) putting at risk a range of current jobs, reskilling as part of a new innovation hub could help to address the skill gaps as identified in section 4.4 of the KPMG 2021 report[9].

Quayside development opportunities included a 'winter garden' concept in the 2014 master plan. With the plans for a new 'Eden Project' in Morecombe[10] across the Irish Sea, consideration could be given to housing a 'satellite Eden project' in Douglas to showcase the UNESCO Biosphere[11] status of the Island creating an international centre of importance that could also link to the innovation needs of the Island in terms of achieving net zero ambitions. North Quay provides a waterfront environment for further restaurants, music venues and weekend open air markets along the quayside.

Markets can play a prominent role in supporting town centre vibrancy and provide the opportunity for retail business start-ups without the cost liability of a bricks and mortar shop.

The 2014 masterplan should be reviewed and updated as the pandemic has driven significant change in the intervening years, particularly regarding retail.

Reflecting on the Island Plan and the key platform for Island vibrancy, we discussed above the lack of a cultural / arts centre in Douglas of any significance. Some of the empty shop units could be considered for creating a new music and arts venue supporting young people into the creative industries such as Future Yard CIC, Birkenhead[12].

[8] https://www.ucm.ac.im/adult-learning/upskilling/
[9] https://www.gov.im/media/1377114/our-big-picture-phase-1-part-1-report-final-public.pdf
[10] https://www.edenproject.com/new-edens/eden-project-morecambe-uk
[11] https://www.biosphere.im/
[12] https://futureyard.org/

It is noted that despite current planning policy regarding out-of-town retail, the Island does have Tynwald Mills Shopping Centre at Ballig, near St John's. However, this could be considered for a branch in Douglas, creating a mini home-grown department store, reflecting on the department store provision in St Helier, Jersey, such as Voisins[13] and de Gruchy[14] possibly located in Tower House.

In terms of the Island Plan, vibrancy is a central strategic objective. Above, we have discussed a number of factors that all contribute to place vibrancy that lead to people coming, staying and spending in a place. Those factors are about getting the offer right in terms of culture and leisure, hospitality (Hotels and F&B), a strong retail offer, quality public realm and ease of access. The former masterplan needs updating but provides a good blueprint and framework for action.

Leadership and governance

The recent formation of the Manx Development Corporation[15] is a positive step and should be used to develop solely where developers cannot or do not have the risk appetite. In addition, the Corporation could develop in joint ventures, carrying out the 'heavy lifting' of the development process while taking a long-term view on economic and social returns, enabling the private sector development market to also shoulder risk for relative returns.

[13] https://www.voisins.com/our-store/
[14] https://www.degruchys.com/
[15] https://mdc.im/

ENGAGEMENT ACTIVITIES

We had several meetings in Douglas with Douglas City Council's Regeneration Manager, Town Centre Manager and also the Department for Enterprise's Built Environment Reform Programme Representatives. Key findings from these discussions are summarised below.

Douglas has greatly benefitted from the physical regeneration of the main shopping area with improved public realm, artwork etc. "10-15 years ago, Douglas was in a shocking state. That's all changed."

It has also moved with the times. "When I first came, pavement cafes were banned, you couldn't even have busking. That has changed."

The vision for the city centre is still unclear. "It can't just be a council vision because it's made up of the various government departments. If you were to ask each government department what their vision is, they would probably be different. We're nothing like as joined up as we should be."

Tackling vacant brownfield sites and barriers to development are a key priority.

From a city centre point of view, a similarly big challenge is to improve the leisure offer. "We're really lacking in leisure businesses in the city centre. We don't have any multiplex cinemas and very little in terms of these types of leisure business. We are trying to fill that gap by putting on events."

Events are very strong, and they are also trying to introduce a higher number of smaller events to support the core ones such as Christmas lights switch on etc. They also have similar gaps in entertainment, and it is difficult to get larger mainstream acts to perform on the Island. Douglas has a 4,000-capacity entertainment venue.

Main challenges for the town centre are improving the leisure offering, a lack of public space for events and addressing the capacity/resource problem for organising events.

This recognition of a need to grow Douglas' leisure sector is very much in line with changing high street trends. Experiential leisure is becoming more critical to high street success and 'competitive socialising' such as escape rooms, axe throwing, immersive game boxes and flight clubs are becoming more prominent features.

Our second meeting in Douglas saw us discuss other policy levers that were being used to improve towns through the Government with the Business Isle of Man agency.

We heard how the Island plan was incentivising brownfield development, developing a local economy strategy and looking at initiatives to make towns and villages more vibrant. Some of the other key points from this discussion are listed below.

Satisfaction levels amongst Manx people were high. "People are happy here, crime is ridiculously low, people leave their houses unlocked. The quality of life is good here, but what people will say is that retail and hospitality can be improved. People have very high hopes for what retail should be."

"There has been no strategy for retail. It's all been a bit over the place."

They are open to high street curation strategies to target key attractions and services that are missing through subsidies and generous rental agreements. For example, they are open to paying the first year's rent to get the right leisure operator in Douglas.

The Isle of Man is the only place in the world to have UNESCO Biosphere status for the whole country. "We do think there is an opportunity to capitalise on this, but we need to get the balance right with the urban areas too."

We also interviewed a number of businesses and shoppers, and a sample of the feedback we received is listed below. Business confidence on the whole was quite buoyant.

"There are some good clothes shops for very young children like M&S, but my older son wants sports clothes and there's only JD, which is more for teenagers. There's not much choice for primary aged children."
Mother with two young children

"There's a lack of shoe shops......I worry about Tesco having a monopoly on the Island now Shoprite is going....I never buy online, and I can get everything I need here."
Retired lady

"Sales are up, business is good and we're up on this time last year. We're one of the chain's flagship stories...trade couldn't be stronger....parking is an issue for shoppers as they only have two hours and might want to stay longer.... the Town Centre Management are great and organised a retailers meeting."
Boots, Assistant Manager

"We're up on everything, we've had our best Christmas yet....it's quiet around 3pm but then busy again at 4pm when the parents come in with the kids after school.... lots of people have stopped shopping online since they stopped the flights and everything has to come by boat. With the boat not running over Christmas, we didn't get all our stock...as people know stuff will take longer to arrive, they come in and buy gifts from us to give to people......living here it's lacking somewhere to go and dance like 'Popworld' in Liverpool and there's no good fashion shops."
Superdrug, Manager

"We lost the mail flight then there was weather disruption....it's a mixed picture for us and we could be doing better......I'm a member of the Chamber and the town centre managers are good....free events in the town are a good idea but the Christmas lights switch on...it sounds like a good idea but it was so busy and people just crammed in to the see the tree so there was no space for people to move up and down the street and shop. So it was a quiet night for us....the late night shopping nights though were great....we're quiet 4-5.30pm."
WH Smith, Manager

"We moved from the end of the high street to down here by the shopping centre and it's a lot busier. Christmas trade was good, January is a bit quiet as you might expect but the loss of the post flight and the weather has had an impact....people want the big national chains and that draws them in....it would be good for the government to work with us as independent businesses and maybe set up an independent business forum."
The Boredroom (independent skate/surf type clothes shop that opened in May)

"Parking puts people off, they don't want to pay.....we're doing well....we're on a ten-year lease (and expect to be there long-term). The boats are an issue with getting deliveries in."
TK Maxx

"Parking is an issue as people have to rush to get back to their car...many customers find us by word of mouth....there are a lot of offices around and this brings opportunities. We want to open in the evening and have shopping nights with Prosecco but the licensing/police rules don't allow this.....it's been difficult....we have a lot of bright colours and the people of Douglas are quite conservative in their dress sense which we're trying to change..."
Copenhagen Luxe (on corner of King Street been there 1.5 years)

CONCLUSIONS

Attention to building façade condition and maintenance is an issue on the main shopping streets of Strand Street and Castle Street. The gateway points to these streets also need improvement to provide an inviting draw into them. Although retail development has its difficulties, the brands that are in Douglas demonstrate that there is good business to be done. New brands however, will want to see an improvement to the retail circuit as described above with the inclusion of leisure, in the form of multiplex cinema, competitive socialising and food and beverage. The unit size on Strand Street and Castle Street may not be suitable. However, new development at Villiers Square and Lord Street and the options to redevelop the former Shoprite store and M &Co on Market Street could provide the new space that would be required.

Public realm in terms of public squares is missing and the city lacks a focal point. Consideration should be given to the conversion of some of the surface level car parks to provide a new focal point in the City.

RECOMMENDATIONS

Establish a Property & Developer Forum between the Private and Public Sectors to jointly recommission the Douglas Masterplan and establish a shared vision and joint strategy for the real estate aspect of the Island's Economic Strategy. This forum certainly should be considered for Douglas but could be applied Island wide. The driver could be the newly formed Manx Development Corporation.

In conjunction with the point above, commission an updated retail capacity study linked to the CACI demographic study.

The Arts Council should commission some gap analysis studies / create new venue options linked to the Creative Industries and with the Enterprise Department of Government.

Regarding innovation, commercial operators such as Plus-X Innovation (https://www.plusxinnovation.com) should be considered for innovation space management as they bring the skill set that links academia with commercial applied innovation.

Develop an improvement and expansion programme for open street market opportunities in Douglas encouraging retail start-up businesses before venturing into shop premises.

Create a series of town-squares to improve movement, connectivity and dwell time through the retail, leisure and F&B core. This can start with improvements to the 'gateway' points described above, improving the public realm on Market Street (including small public squares) and bringing forward the developments on Villiers Square, and the site between Fort Street and Lord Street to create new town squares and meeting places.

Introduce a shop fronts and building façade improvement programme – grant funded where appropriate.

PLACE STANDARD REVIEW

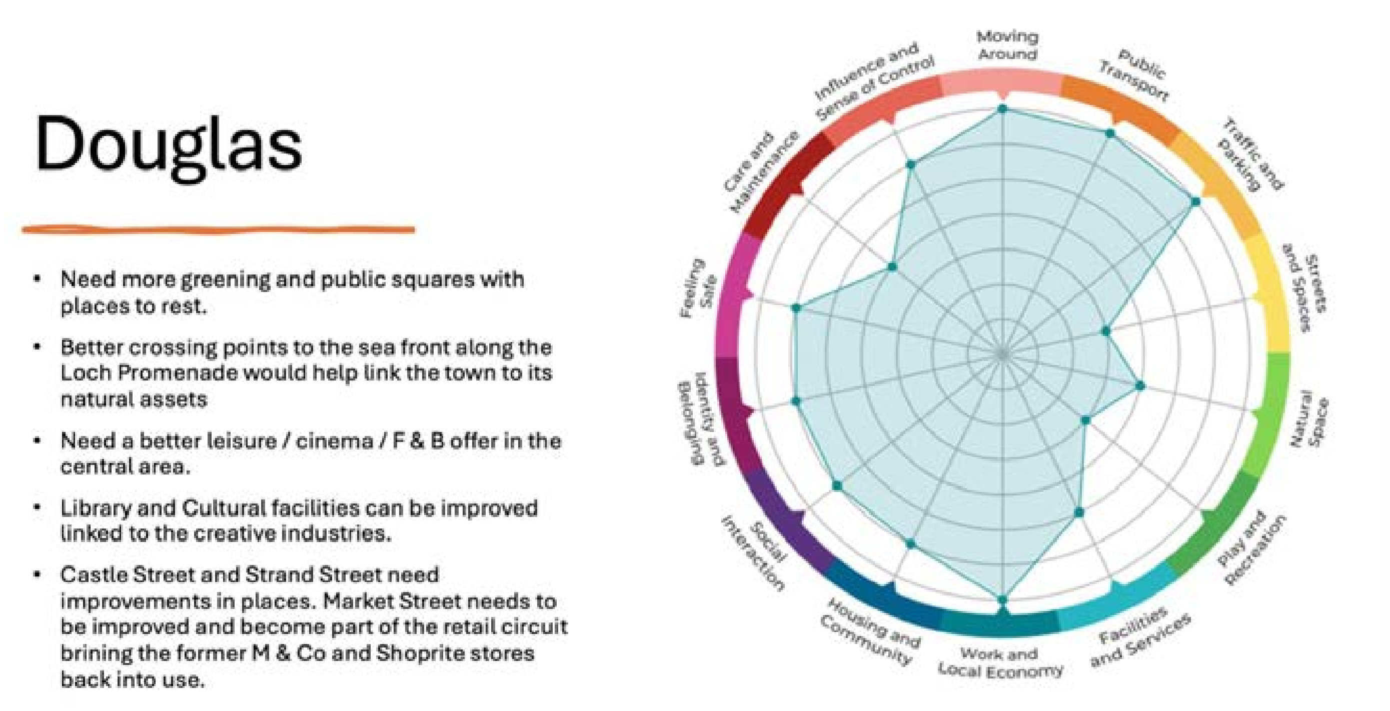


Figure 10. Place Standard outputs for Douglas (Source www.ourplace.scot)

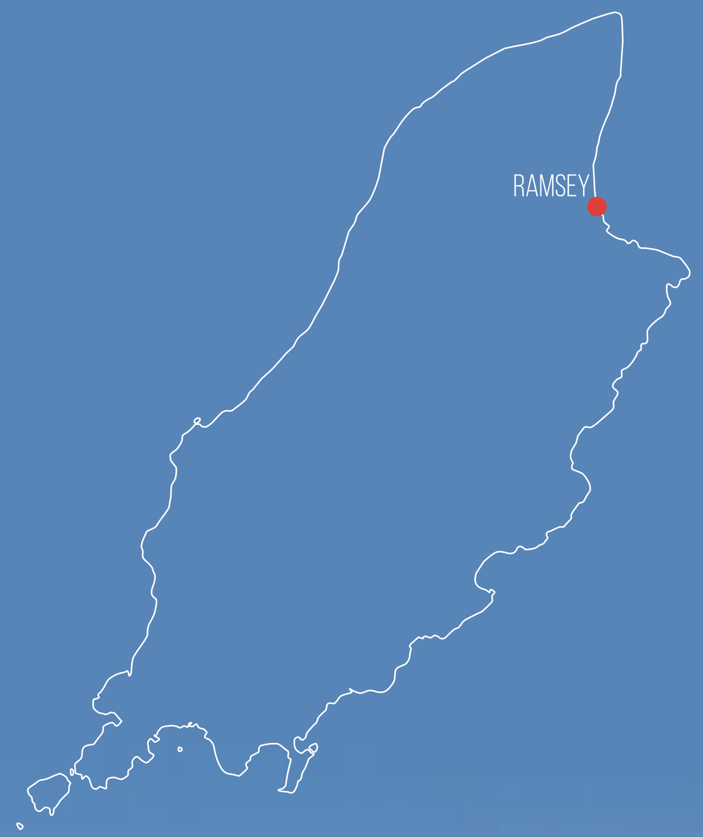
RAMSEY

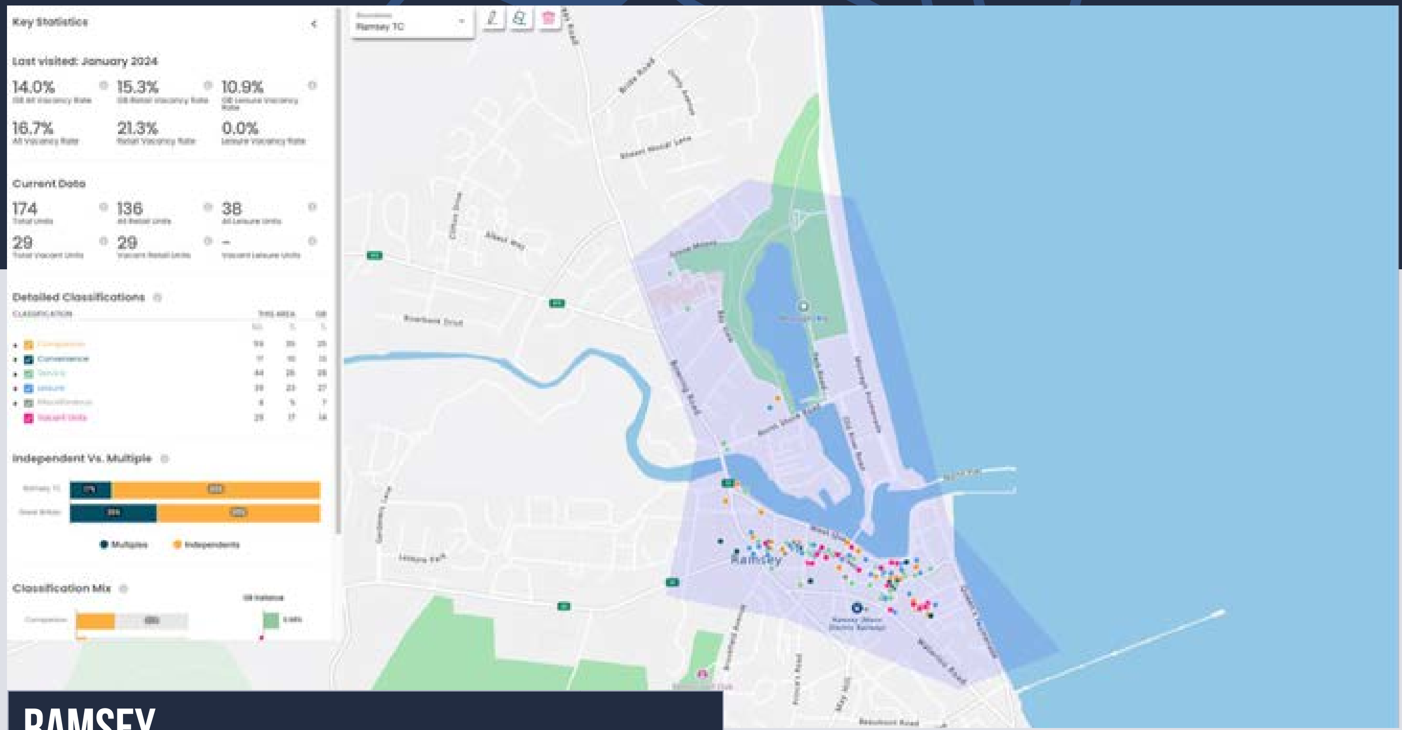
Ramsey is situated on the northeast coast of the Isle of Man with a population of approximately 8,288[16]. The prominent feature of the town is the historic harbour and port.

The town is only 15.4 miles away from Douglas along the direct A18 road taking approximately 29 minutes in normal traffic conditions.

Cultural attractions include the Grove Museum of Victorian Life, and The Mooragh Park with a lake, gardens, and sports facilities.

[16] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022. https://citypopulation.de/en/isleofman/admin/garff/12__ramsey/





RAMSEY	
Retail and Leisure Units	174
Retail Units	136
Leisure Units	38
Vacant Retail and Leisure Units	29
Vacant Retail Units	29
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	16.7%
Retail Vacancy Rate	21.3%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	59
Convenience Retail Units	17
Service Retail Units	44
Leisure Units	39
Population	8,228
Population to Retail and Leisure Units ratio	48

UNDERSTANDING MANX PLACES

Ramsey is a medium sized town. The population is mixed with a range of educational attainment and some more deprived households. It has a higher older working age population than other clusters. It has a higher proportion of single person households than those in other clusters. It is a growing town.

Ramsey is an independent town. A similar Scottish town is Forres - https://www.usp.scot/Town?mainTownName=Forres and on the Isle of Man is Douglas.

Figure 11 (Top). Ramsey overview on Local Data Online (Source Local Data Company)

Figure 12. Ramsey retail and leisure units overview (Source Local Data Company)

Figure 13. USP interrelationships classification for Ramsey

Figure 5. USP interrelationships classification for Douglas

Existing Offer and Amenities

The detailed retail analysis for Ramsey is covered in the LDC Baseline data above.

Parliament Street is the main high street. The town supports a large Shoprite store (to become Tesco) plus a Co-Op convenience store and Co-Op supermarket. Most of the shops on the high street (Parliament Street) are local independent shops and include Felton's Ironmongers established in 1859. A second Shoprite store is located in the St Paul's Square shopping centre at the eastern end of the town centre.

The town has a cottage hospital, golf course, sailing facilities, urban park – Mooragh Park, football and rugby, bowling, indoor swimming pool, Heritage Centre Museum, Coronation Park – Play park and the terminus of the Manx Electric Railway.

The town has a modern town hall and library building. A food and beverage offer exist in the various public houses / hotels, plus restaurants and hot food take aways.

Key attractors and identity/sense of place

Ramsey has a unique identity and sense of place. The small proportion multiple chain retailers on the high street help to distinguish the town's identity.

Attractors such as the cultural and heritage offer, given their location, do not act as an anchor or attraction point to serve the high street. The overall offer in the area sits further afield than the town itself. The overall public realm along the high street is poor save for the square / gardens outside the Courthouse. Vacant buildings along the high street are a detractor. Negative aspects include vacant and dilapidated units in Victoria Mall off Christian Street.

Furthermore, a sense of 'heart' is missing. In part, it feels like the garden space outside the Courthouse is the heart, however, a better location would be Market Place. Market Place connects Parliament Street (the high street) to the harbour / waterfront. Consideration should be given to investment here in the public realm with incentives to deliver improved local retail, food and beverage offers. This would create a destination within Ramsey and act as an 'anchor' for Parliament Street.

Turning the corner from Market Place, you enter West Quay. Currently, there is no attractive offer on West Quay, despite the waterfront setting. This is an asset that currently looks like a liability and therefore requires intervention. Some recent development has taken place, such as the building on the corner of East Street and West Quay occupied by financial services company I-CAP.

Improvements to Market Place should also help to 'knit and stitch' the shops at St Paul's Square into the town fabric and better link the bowling alley on Queen's Promenade.

Socio demographics – offer for young, working age and retired populations

The 50-69 age group make up 27% of the Ramsey population. 48% of the population are over the age of 50 (including 80+)[17].

[17] https://citypopulation.de/en/isleofman/admin/garff/12__ramsey/

Figure 14. Parliament Street – Ramsey – (Image – Didobi)

Figure 15. Victoria Mall – Ramsey (Image Didobi)

Figure 16. Ramsey harbour front properties (Image Didobi)

Given the facilities in the town as noted above, there is an offer for all age groups. Leisure provision including Mooragh Park, the new indoor swimming pool, play park, bowling alley, cafes, community facilities etc all provide a reasonable offer.

However, as stated above, the overall attractiveness needs some work to draw any new demographic to the town, including dealing with infill development sites and making Market Place the ‘heart’ of the town.

Initiatives and events such as the fish and chip boat at the harbour should be extended to make the most of the harbourside / waterfront as stated above.

Quality local food and beverage operators such as Frank Matcham and others should be encouraged to come to the town occupying space in Market Square and West Quay. This will need a programme initiative, supported by the Isle of Man Government and will require grant support for public realm improvements and building renovation. This programme initiative should include the development of ‘stuck sites’ in the town that are currently a detractor to the overall offer and attractiveness.

As stated with other place reviews in this study, the affordability issues as referred to in the Housing Market Review[18] have the potential to be mitigated through state acquisition of smaller existing town centre homes that require upgrading and providing them back to the market on affordable rental terms or through a shared equity scheme. This should assist with both housing affordability issues and bringing a younger demographic into the town centre.

[18] Isle of Man Housing Market Review 2022 Statistics Isle of Man Cabinet Office May 2023 - 2022-housing-market-report-030523.pdf (gov.im)

Alignment of offer to achieve sustainable population growth

In terms of any targeted inward migration, Ramsey offers a very attractive proposition for living provided that further development is realised on the back of the required public realm improvements already described.

The key asset of the working harbour is not being realised currently. The improvements described above could help with the overall draw to Ramsey particularly for the evening economy and weekend leisure activity.

The harbourside could also provide the setting for new workplaces, in terms of managed workspace / co-working space such as The Engine House in Castletown and Douglas and ‘netcetera / coworking.im’ in Ballasalla. Given the longer commute to Douglas, enabling a ‘home-grown’ business community could also help to mitigate seasonality issues and help support fledgling food and beverage operators.

Figure 18. A grant funded painted shop in Ramsey (Image Didobi)

Figure 17. RNLI shop in Ramsey (Image Didobi)

Changing role of retail and alignment to IoM consumer aspirations

The town already has over 80% of its retail units in independent hands. This is a positive for the town given the changes to retailing across the British Isles, especially with the financial and structural problems being experienced by some multiple comparison goods retail businesses. With on-line shopping complimenting in-store shopping, multiple comparison goods retail operators can serve a greater catchment from fewer stores, therefore save for Douglas, trying to attract such operators will be difficult. Landlords in larger towns and cities in the UK are having to take more risk with lease deals such as 'total occupancy cost' / 'turnover based' rental deals.

Given the proliferation of independent businesses, on the high street, yet also a high proportion of vacancy, some repurposing away from retail may be required with uses such as those described above.

Accessibility

Ramsey is accessible by road, electric railway and by sea. The A2 and A18 serve the town with routes to Douglas and the south and the A3 provides a route to the west. Express bus services exist in the form of the X3 (using the A18) along with services 3 and 3A to Douglas, 5, 5A, 5C, 6A to Peel and other local services to communities in the north.

The town has parking facilities serving the main convenience retail stores, civic functions and local shopping.

Spatial layout and connectivity

The town sits to the south of the Sulby River with the Mooragh Park and Swimming pool to the north of the river and harbour with connectivity via the Ramsey Harbour Swing Bridge to the east and the Bowring Road Bridge to the west carrying the A9 road route.

Permeability through the town is good. Roads cross the town centre north and south, east and west. The topography makes the town very navigable on foot or cycle, suggesting that active travel could be promoted.

Culture, Leisure, Events, Seasonality and Tourism

The provision of hotel room accommodation looks to be sparse. Simple Google and Booking.com searches reveal very little on offer in the town itself. It is noted that the relatively new Ramsey Park Hotel overlooking Mooragh Park Lake provides 3 star – mid market offer. The opportunity to grow boutique accommodation in the town alongside an improved food and beverage offer should be considered.

The leisure opportunities are plentiful, from golf to sailing, to fishing, cycling and the motor sport events that happen in the town.

Ramsey's offer extends to the vicinity to the north that encompass attractions and historical sites along with activities and tours.

Seasonality issues do not seem as prevalent as for other places on the Island, as vacancy and closed premises were largely a result of changes to retailing viability rather than dependency on seasonal influxes. However, what we have described above in terms of improving the offer and increased workplace provision should help to mitigate and seasonal fluctuations.

Local Vision and Aspirations

In the absence of any specific vison for Ramsey, the town commissioners could work with the Isle of Man Government to embed the Island Plan Vision regarding "...building a secure, vibrant and sustainable future for our Island Nation[19]". A strategy to enhance the local offer through public realm and building improvements tied to occupational incentives could form a programme of projects tied back to the Island Plan. This should include, where practical, bringing vacant space above shops back into use, adding overall footfall and therefore vibrancy to the town centre.

[19] https://www.gov.im/Islandplan

ENGAGEMENT ACTIVITIES

We met with the Local Authority Chair and Town Centre Manager (Tim Cowin & Steven Bevan) to discuss where gaps existed in service provision and how Ramsey could be improved for residents and visitors. Key points from this meeting are summarised below.

Social capital was identified as a strength. Both spoke of how well organisations and clubs (Freemasons, Rotary, sports clubs) operated in the town, creating a strong sense of belonging.

The business community want more town centre events. They already put on quite a lot including fireworks, festivals etc. "We could do more to promote events around the TT, though, simply because there is so much of the TT course that is in Ramsey. There is also a small farmers market and there is interest in more markets."

Tourism is not especially strong – there is one hotel and an opportunity to do more to attract visitors. It's also a dark skies site. "It used to be a tourism town, but it's changed."

The Council, Town Team and Chamber of Commerce are the key vehicles for driving change.

They have a cottage hospital, GP surgery Elderly Mentally Infirm services and two dentists.

When people are asked about gaps in provision, there is a bigger focus on hospitality – "they want Nando's" instead of retail. There isn't a food market hall.

The buildings and infrastructure in the street are all from around 1850. It's a conservation area, which places some constraints on what people can and can't do with the buildings. They are expensive to keep up. "We've had a few buildings that have fallen into disrepair, been knocked down and not rebuilt. So, we have broken teeth." Young people are not particularly well served. "Nightlife is predominantly in Douglas."

They do not have a 'vision' for Ramsey, but they are working on a 'Making Ramsey a Better Place to Be' plan. There are not many places to develop. "Ramsey is full. All those in-fill plots are filled."

It is accessible. "Ramsey is pretty much a 15-minute neighbourhood."

There is not much support for start-ups or incubation facilities and co-working spaces.

They have lots of people living in suburbs but not many in town. "It would be great to have more people living in town." This contributes to a lack of footfall and vibrancy in the evening.

Following our meeting, we also met with local businesses and their concerns and feedback are summarised here. Business confidence was weak among those we spoke to.

"We have worked here for three years now, and Wednesday's have been quiet for the last six months or so...In the pandemic, we couldn't get fridges in fast enough...sales are seasonal, and we also sell online. Business is good. We help each other (businesses in the town) and I send people to Colburns and Currys as we don't sell TVs..."
Euronics 'Marown Electricals'

"December was quiet and we moved the Christmas sale to the 1st Jan as we used to do four or five years ago, and it's been going really well. Last year wasn't great. People need to eat and keep warm so don't have the same need for a new sofa...we invest a lot in our appearance, we stock brands you can't get elsewhere and have exclusives....

"We're also a member of the Chamber and are keen to see business have a bigger voice. I've been to a couple of meetings, but we need them monthly, people are trying

ENGAGEMENT ACTIVITIES

to do them every few months but that means if you miss one it's a long time without any contact. They have a town and village regeneration scheme for exteriors. We wanted to use it for new windows and rendering, and we needed three quotes. But given the scale of the job there was only two people we could get on the Island to quote for it. I rang the council and they understood. But when we submitted the application in October, and I rang them in December to chase the outcome, they said it had been declined because it only had two quotes. The work had to be completed by Feb, so the timescales didn't allow for submission and time to complete the work anyway as the windows take 12 weeks to manufacture.

"There is too much bureaucracy. Things could be made easier for businesses to apply for grants and use these schemes to keep their shop fronts looking nice..... similarly we tried to apply for a loading bay for our delivery truck outside to stop vehicles having to park half on the pavement and blocking the road. But the council? They looked on the map and said 'you've got a back lane' which in reality is narrow and we couldn't get the delivery van down there as other shops park their vehicles down there...so we gave up on that one and just park illegally."
Millichaps (Furniture)

"We would benefit from small business rate relief...footfall is terrible, there are more cars than people....Covid was a disaster and business has struggled since then. Young people don't buy flowers and others buy online......the rents are high (we pay £1,100 a month)...so it's hard.

"Ramsey is a dormitory market town with around 6,000 people. A third are elderly and tend to stay at home, a third are children and young people which leaves a third, roughly 2,000 people who could come and shop in town. Most of these who work leave and head to Douglas each day, so who's left? It's just a handful of shoppers each day....Business rates should be subsidised by the big businesses, the big casinos, and the like with big pockets...no I won't be here in 5 years' time." Florist

"We have been open since 2009...and it would be great to shut down the main road and make it pedestrianised. We had a really good Xmas, but footfall isn't great. We can't afford to advertise. They (the council) need to do more to advertise independent businesses....VAT is a killer for small businesses....we need more events, there's not a lot except at Christmas....we're doing well considering it's January, people are out spending money...it's a nice town...."
Indulgence (Skin and body care)

"We opened in September and we decided to launch the venture after I was made redundant from a job in finance after 20-years. I wanted a space for items/art made by local artists and people....we painted shop front and are happy to be part of a good street of independents. There are good networks between businesses and me as a business owner and resident of the town....We have every shop here, where else can you find a fish shop, a drapers, coffee shops, everything you need on one street?"
Pink Seaweed (art gallery)

CONCLUSIONS

Ramsey is overall an attractive town that suffers from stuck development sites in the town centre, vacant retail units and some degree of dilapidated buildings. The opportunity to make more of the harbourside position with enhancements to Market Place which could also host local markets, with follow on improvements to West Quay, would make for a more attractive town.

Ramsey could become the alternative harbourside commercial centre to Douglas, with flexible workplaces, improved food and beverage and housing all focussed around creating a new 'heart of the town'.

RECOMMENDATIONS

- Focus on creating a new 'heart of the town' project to raise the quality of Market Place that will 'knit and stitch' together Parliament Street, West Quay and St. Paul's Square. This will require funding from the Isle of Man Government.
- Working with a Ramsey or Island Wide Property Forum, work with the Manx Development Corporation to develop a strategy for dealing with the 'stuck / vacant' sites on Parliament Street and West Quay.

PLACE STANDARD REVIEW

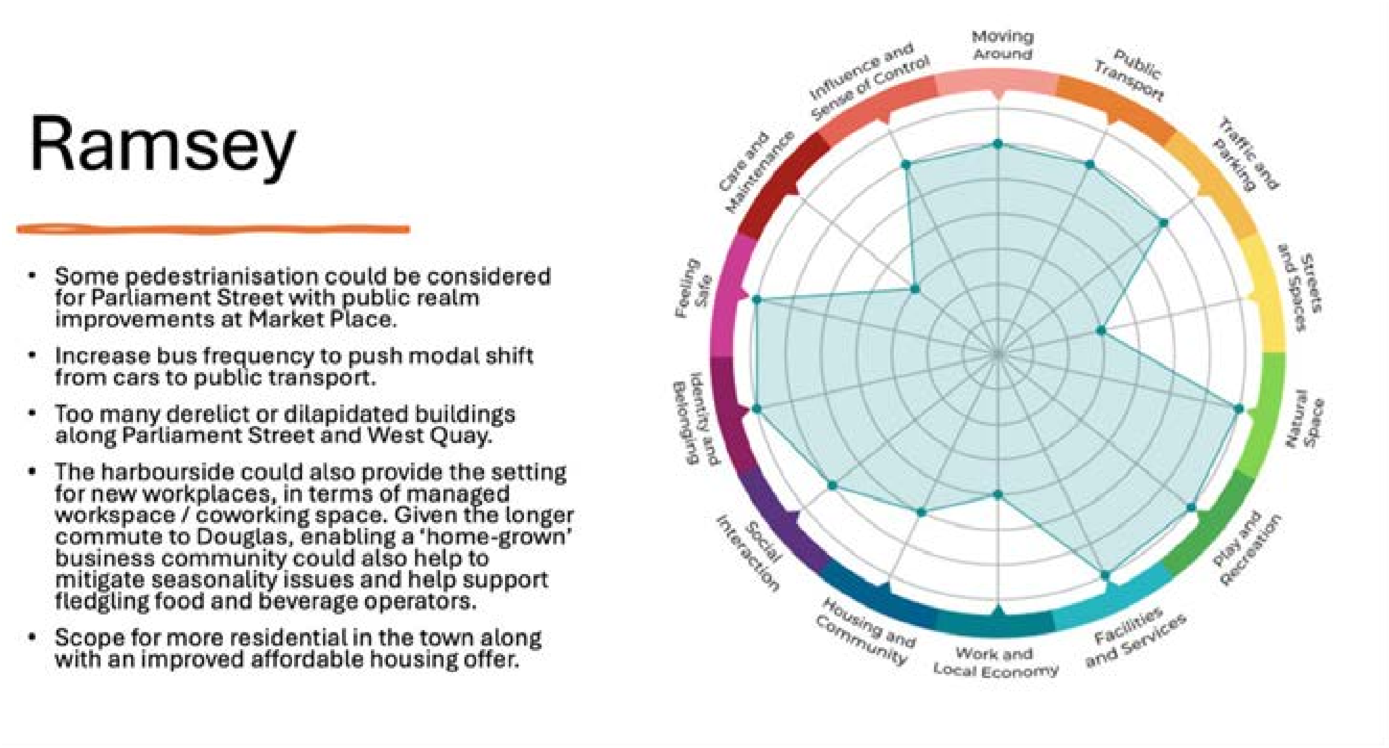


Figure 19. Place Standard outputs for Ramsey (Source www.ourplace.scot)

PEEL

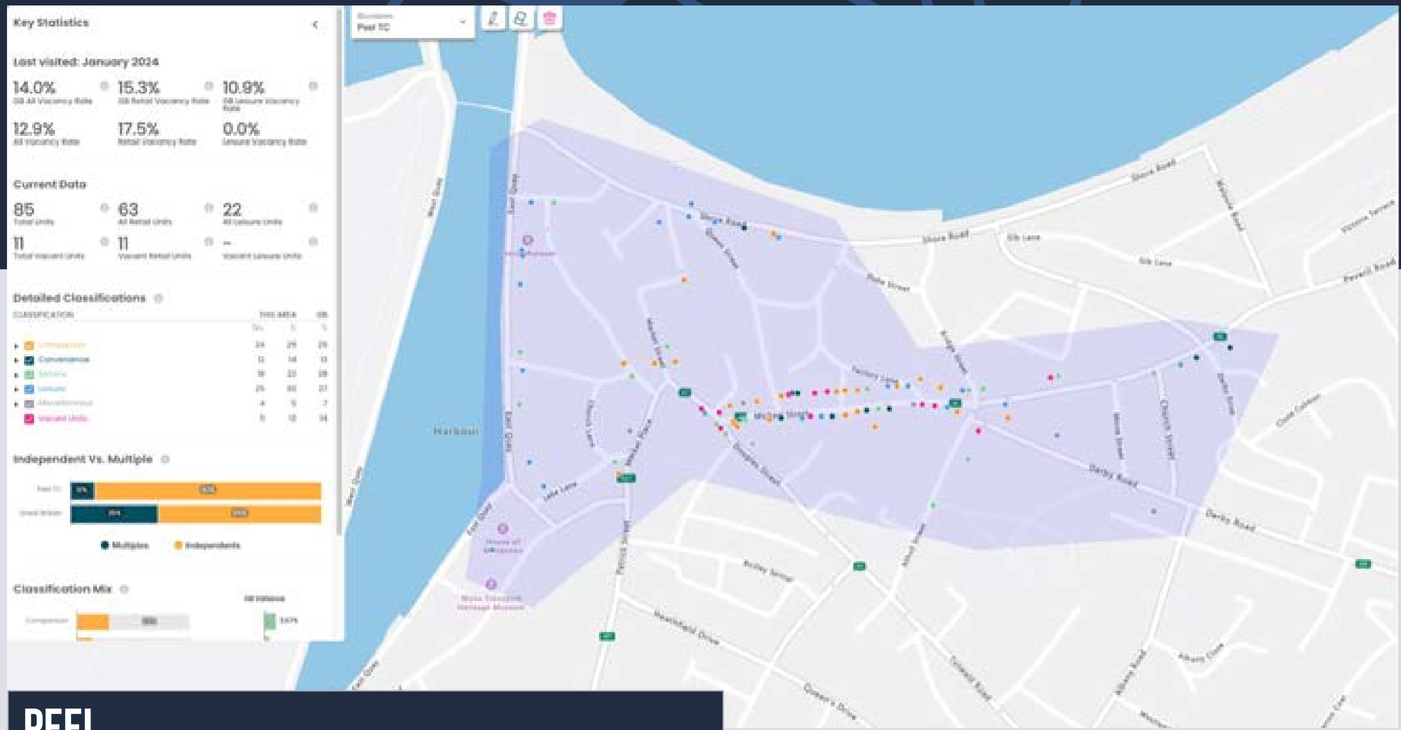
Peel is situated on the west coast of the Isle of Man with a population of approximately 5,710[20]. The town is dominated by Peel Castle, a medieval fortress perched on St Patrick's Isle, which is connected to the town by a causeway.

The town is only 10.9 miles away from Douglas along the direct A1 road taking approximately 24 minutes in normal traffic conditions.

Peel is a characterful town, marked by its narrow streets, beachfront, harbour and Peel Castle.

Peel is the third largest town after Douglas and Ramsey, but fourth in overall population size as Onchan is larger but ranked as a village.

[20] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022



PEEL	
Retail and Leisure Units	85
Retail Units	63
Leisure Units	22
Vacant Retail and Leisure Units	11
Vacant Retail Units	11
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	12.9%
Retail Vacancy Rate	17.5%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	24
Convenience Retail Units	12
Service Retail Units	18
Leisure Units	25
Population	5,710
Population to Retail and Leisure Units ratio	67

Figure 21 (Top). Peel retail and leisure units overview (Source Local Data Company)

Figure 20. Peel overview on Local Data Online (Source Local Data Company)

UNDERSTANDING MANX PLACES

Peel is a medium sized town. Towns in this cluster are less mixed. The town has a higher proportion of 2 person households than in other clusters. Home ownership and car ownership are also more common in this cluster. Part time employment is more important than in other clusters. It is an expanding town.

Peel is an interdependent to independent town. A similar Scottish town is Ellon - https://www.usp.scot/Town?mainTownName=Ellon and on the Isle of Man are Port Erin and Laxey.

Figure 22. USP interrelationships classification for Peel

Existing Offer and Amenities

The detailed retail analysis for Peel is covered in the LDC Baseline data above. Michael Street is the main high street with the Island's two main convenience stores represented, Co-Op and ShopRite, soon to become Tesco. Comparison goods shopping includes surprises such as Paradise & Gell selling home furniture including luxury brands. The Mannin Music Shop is also another surprise.

A small selection of food and beverage outlets exist in the form of hot food takeaways, restaurants, and public houses.

The town boasts a community run Arts Centre, The Centenary Centre with a programme of year-round events. It has a town Library, The Ward Library, a swimming pool, tourist information centre, police station, town hall and public conveniences. The town also hosts the Manx Whale and Dolphin Watch Visitor Centre.

Antiques are on offer in various outlets and there is an Antiques Trail to follow[21].

Museums are another feature of the town with five (even if some are small) offering an insight to the history, heritage, and culture of the town[22].

[21] https://www.peelonline.net/whats-on/antique-trail/
[22] https://www.peelonline.net/whats-on/museums/

Key attractors and identity/sense of place

Peel has a unique sense of place. This is shaped by the Castle, the beach and shoreline, the promenade along Shore Road, the River Neb flowing into the Harbour, the narrow and medieval street pattern and characterful buildings including those using the local red sandstone in their construction.

All the above attributes along with the cultural offer, give Peel a very clear identity and sense of place that could be built on.

Detracting from the otherwise good attributes about the place are the vacant and dilapidated buildings particularly along Michael Street and part of Atholl Place.

Socio demographics – offer for young, working age and retired populations

Except for the 80+ age group, there is almost an even distribution of age groups from 0-9, 10-19 etc to 70-79 at 11.86% for each group. The 15-64 age group represents 61.58% of the population[23].

Local facilities and amenities serve the population well. The Centenary Centre provides a community cinema facility and is a member of the UK Sheffield based 'Cinema for All' charity supporting the development of independent and community cinemas. With streaming services becoming more popular and sophisticated, the community cinema provides a local focal point and a 'sweet spot' where the local community can come together adding to the security and vibrancy elements of the Island Plan.

[23] https://www.citypopulation.de/en/isleofman/admin/glenfaba/13__peel/

Fig 23. Peel town centre (Image Didobi)

Figure 24. Vacant and dilapidated buildings – Peel (Image Didobi)

The offer and amenities listed above provide a range of options for the population.

The attractiveness of the town does need enhancing given the quality of the public realm and the number of vacant and dilapidated buildings. Improving the attractiveness should assist with creating a 'demand pull' for further residential development options as described in the Draft Area Plan for the North and West[24].

It is likely that given the density of development as indicated in the draft area plan, that new sites will be primarily for family homes. The affordability issues as referred to in the Housing Market Review[25] have the potential to be mitigated through state acquisition of smaller existing town centre homes that require upgrading and providing them back to the market on affordable rental terms or through a shared equity scheme (as stated for Ramsey). This should assist with both housing affordability issues and bringing a younger demographic into the town centre.

Alignment of offer to achieve sustainable population growth

In terms of any targeted inward migration, Peel offers a very attractive proposition for living provided that further housing development is realised on the back of the required public realm improvements already described, with new homes being energy efficient, building on the sustainable leg of the Island Plan. Combined with further promotion of the UNESCO Biosphere, the attractiveness of Peel should improve beyond where it ranks today. The natural and heritage assets are a magnet along with the historic and cultural offer and proximity to Douglas.

[24] https://www.gov.im/categories/planning-and-building-control/planning-policy/development-plan/draft-area-plan-for-the-north-and-west/
[25] Isle of Man Housing Market Review 2022 Statistics Isle of Man Cabinet Office May 2023 - 2022-housing-market-report-030523.pdf (gov.im)

Changing role of retail and alignment to IoM consumer aspirations

Previous surveys across the Island have indicated a desire for certain brands, especially those offered by multiple chain retailers across the UK. With the exception of Douglas as a location, it would be difficult to attract certain high street brands to take units in Peel. The nearby retail outlet at Ballig, near St John's, The Tynwald Mills, seems out of kilter with national planning policy in terms of out-of-town retail provision. However, a number of mid-market brands are offered there, and ease of access and car parking would probably draw any potential retailers to this location first, ahead of Peel centre.

A few additional complementary comparison good retailers that could cluster with Paradise & Gell may provide a unique offer for Peel, however the demand for this will require further retail research. Existing landlords may need to provide rental and capital incentives for which currently they may be reluctant to provide.
The vacancy levels on Michael Street are a blight to the street and therefore state intervention may be required with both 'carrot and stick' approaches such as High Street grant funding or retail premises high street rental auctions.

Accessibility

Peel is on the main A1 road to Douglas at a distance of 10.9 miles and approximately 24 minutes' drive time. Bus Vannin[26] routes 5, 5A, 5C, 5J, 6A, 6J link Peel with Ramsey and Douglas and 4, 4B, 4N and 4R link the town with connections to Port Erin, Port St Mary, and Castletown. The road network makes for easy connections with Ronaldsway Airport.

Spatial layout and connectivity

The town's focal point / town centre is Market Place at the convergence of Castle Street, Patrick Street, Market Street and Douglas Street with residential areas radiating out from the town centre. The fishing and industrial zone is to the west of the town and on the east bank of the River Neb.

[26] https://www.iombusandrail.im/

Figure 25. Peel Castle and beach (Image Didobi)

The town centre is highly permeable therefore enabling a future option to increase the cultural and heritage offer (over and above the existing Antiques Trail) as part of an improved vibrancy programme linked to the Island Plan.

Culture, Leisure, Events, Seasonality and Tourism

As already described, Peel is active with local events that are listed on the Peel Online website[27]. Culture and Heritage are strong given the museum activity and presence of a castle. However, it is interesting to note that hotel accommodation in the town feels weak. A search on Booking.com for both low and high seasons produces listings for accommodation some eight miles away from Peel. Google searches also back this up with very few local stays available. It is interesting to note the plans for 'pop-up' accommodation along Peel Promenade and some of the objections raised. This does point though to a study beyond this one in terms of understanding the demand for quality stays that could be all year round linked to heritage and food and beverage offers that would mitigate for seasonal peaks and troughs.

Local Vision and Aspirations

The inability for the local community to engage with this study maybe indicative of 'lost hope' or 'survey fatigue' given the outcome from other surveys. In the absence of a local vision or driver, the Manx Government need to support a new community engagement programme with the certainty of funding and other resources to overcome local challenges as highlighted above. A new forum linked to the wider Island vision could be a way forward.

Opportunities in relation to national vision and strategy for the Island – Leadership and governance

Vibrancy and Sustainability are two of the three legs of the Island Plan. A sub-committee of the Peel Commissioners or local business and resident's forum could be established with administrative support from central government to focus on the town's vibrancy and sustainability.

Sustainability programmes should relate to the UNESCO Biosphere project. For vibrancy, it is about people using and enjoying the town centre. This means: People are coming to the town, staying in the town, and spending in the town. The people of Peel and the Isle of Man will know best what will drive Island wide vibrancy and therefore a specific improvement programme sponsored by local people should be adopted building on existing strengths.

Engagement

We were not able to engage directly with either the Commissioners or the residents of Peel and have therefore have relied heavily on the Future Peel survey, which gives very detailed community feedback on what people like and dislike about their own, and what they would like to see improved. . However, there is evidence of considerable community activity to build on.

Some of the businesses we spoke to indicated that trading confidence was reasonable. The Cod and Castle fish and chip shop, for example, said that since they started offering a delivery service they have increased trade during the off season. They own two shops in Peel and they can now keep both shops open instead of having to shut one during the winter months.

Figure 26. Paradise & Gell Store – Peel (Image Didobi)

[27] https://www.peelonline.net/events/

CONCLUSIONS

The poor public realm in parts and the degree of vacancy along the main high street point to the fact that Peel could do better than it is currently. With the asset base and current community activity to build on, Peel could become the cultural and heritage centre for the Isle of Man.

We reviewed the Future Peel survey delivered through Create Streets and noted a wealth of feedback. A sample of some of the comments relating to the town include:

- There is a struggle to move between 'Old Peel' and 'New Peel' due to narrow streets that are not child-friendly or suitable for cycling
- Signage is needed from the town hall to the Promenade and Harbour
- A request for a multi-story car park
- The outdoor space could be used for so much more – an outside cinema screen, pop up restaurants, bars etc.
- A desire for more market days
- Michael Street needs improving – there are poorly maintained properties, empty shops and lacklustre window displays

RECOMMENDATIONS

With the current assets and attributes of the town, Peel could be promoted as a cultural and historic centre. Improvements, where required, to the museums could be the basis of a business case for funding as could the general improvement of the public realm with grants to building owners to bring buildings back into use and for general improvements to building facades.

Analysis of demand for hotel stays could help with the development of the hospitality industry on an all-year round offer.

PLACE STANDARD REVIEW

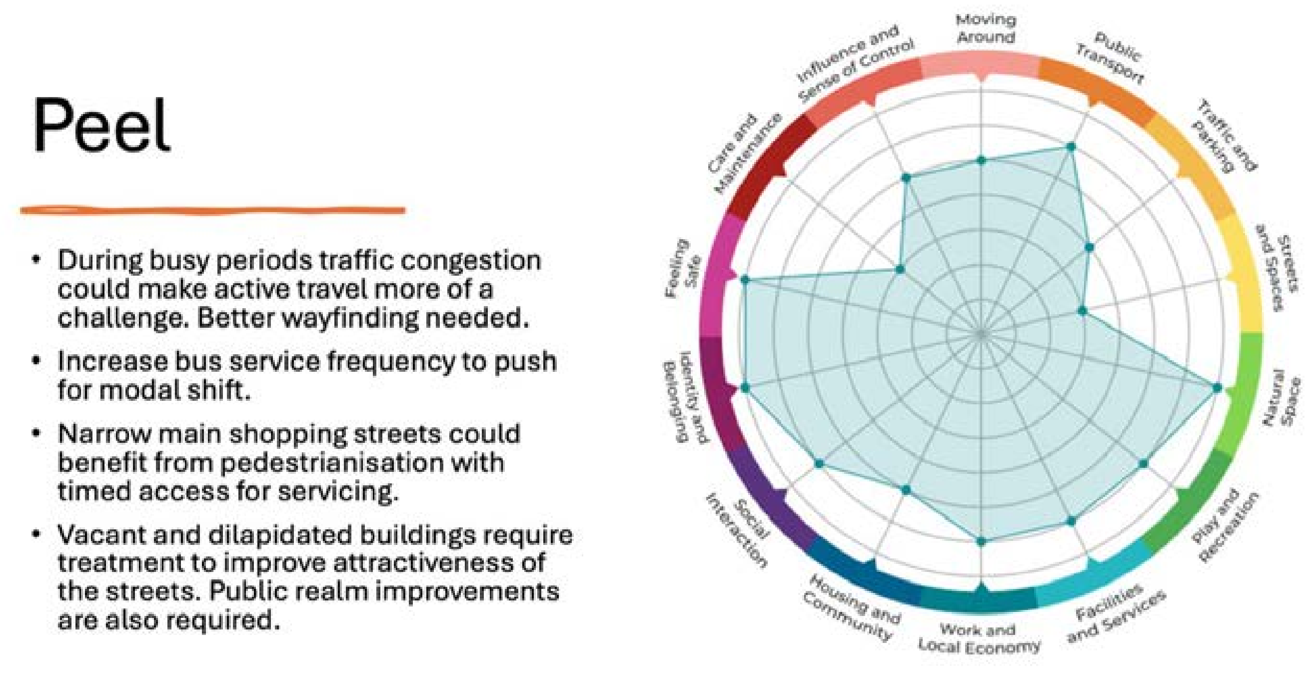


Figure 27. Place Standard outputs for Peel (Source www.ourplace.scot)

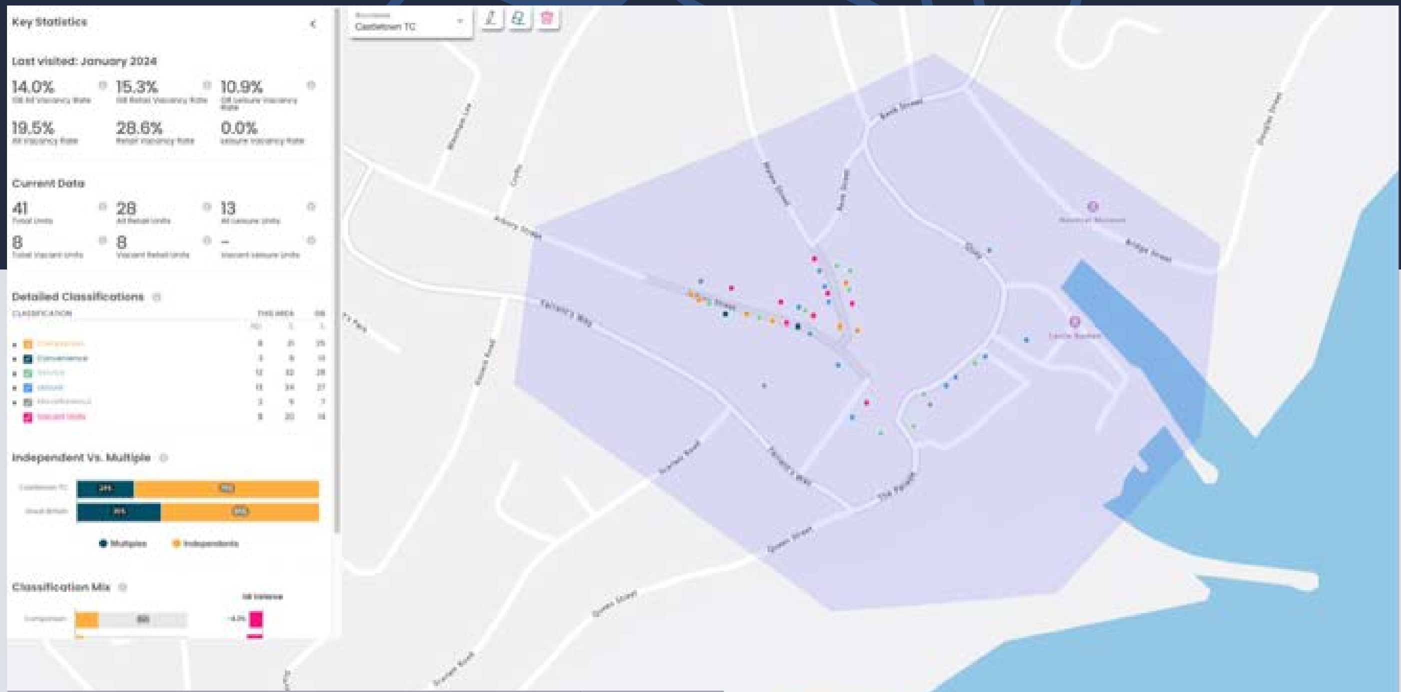
CASTLETOWN

Castletown, the ancient capital of the Isle of Man is situated on the south coast of the Isle of Man with a population of approximately 3,206[28]. The town is dominated by the medieval Castle Rushen which sits in the centre of the town.

The town is only 10.3 miles away from Douglas along the direct A5 road taking approximately 23 minutes in normal traffic conditions.

Castletown is a very picturesque and distinctive town, marked by its access along the harbour and Silverburn River, narrow streets, market square, harbour and Castle Rushen.

[28] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022



CASTLETOWN	
Retail and Leisure Units	41
Retail Units	28
Leisure Units	13
Vacant Retail and Leisure Units	8
Vacant Retail Units	8
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	19.5%
Retail Vacancy Rate	28.6%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	8
Convenience Retail Units	3
Service Retail Units	12
Leisure Units	13
Population	3,206
Population to Retail and Leisure Units ratio	78

Figure 28 (Top). Castletown overview on Local Data Online (Source Local Data Company)

Figure 29. Castletown retail and leisure units overview (Source Local Data Company)

UNDERSTANDING MANX PLACES

Castletown is a medium sized town which acts as a focal point for the south of the Island. Towns in this cluster have a more elderly population, often living on their own. There is also a higher proportion of social rented housing than in other towns and there is a higher proportion of people with no educational qualifications.

Castletown is an interdependent to independent town. A similar Scottish town is Buckie - https://www.usp.scot/Town?mainTownName=Buckie and on the Isle of Man is Port Mary.

CASTLETOWN

Figure 30. USP interrelationships classification for Castletown

Existing Offer and Amenities

The detailed retail analysis for Castletown is covered in the LDC Baseline data above.

Local facilities and amenities serve the local population. Convenience food shopping is provided by the Co-Op and the Shoprite store soon to become Tesco. Other retail serves both the local and visitor population alike. There is no comparison shopping to note. There is a youth centre, medical centre, pharmacist and veterinary centre. There is ample public open space, plus beach frontage, along with sports pitch provision and a swimming pool.

Gastro pub and fine dining has started to grow and adds to both the daytime and evening economy.

Key attractors and identity/sense of place

Castletown has the benefit of not being dominated by Victorian terraces and boasts a local architectural vernacular. The gateway to the town is along the Silverburn River and Harbour with Rushen Castle dominating the vista as one crosses the bridge on Bridge Street.

The heritage of the town and marine setting are both key attractors and give the town a strong sense of identity. The inner harbour, outer harbour and breakwater with lighthouse also distinguish the town from anywhere else.

There is a clear 'heart of the town' at Market Square that has undergone quality public realm improvements creating the setting and impetus for improvements and investments into the surrounding buildings.

Socio demographics – offer for young, working age and retired populations.

Of the 3,206 resident population 22.55% are under 20, 48.13% are between the ages of 20-59 and the over 60s represent 29.32% of the population.

With the schools, the youth club, sports facilities and swimming pool, there is certain provision for the under 20s. For older generations, the restaurants and cafes plus the various community groups and clubs that exist will be the main offer[29]. A variety of public houses are present from the Viking Hotel and Sidings Inn in the north to the George Hotel to the south and in the town centre via The Castle Arms. These together with the cafes and recently opened Costa provide enough places to meet and socialise.

Alignment of offer to achieve sustainable population growth

The programming of events already being carried out by the Town Commissioners is to be applauded. The activation of the public realm is as important as capital-intensive building projects. The investment that is being made by the private sector in the hospitality industry is evidence of both the improvement of the public realm and the activation of it paying off. Some of these activities may not work, some will stick, and some will change over time. However, starting by starting rather than waiting for somebody else to make a move is the right thing to do.

[29] https://castletown.org.im/community/index.html

Figure 32. Gelato kiosk Castletown (Image Didobi)

The activity in Castletown and the subsequent investment being made is fully aligned with the strategy of improving the Island's offer to improve vibrancy by improving the attractiveness of place for both locals, inward investors and potential new settlers investing their family life in the Isle of Man.

As Betty Laurincova, the Isle of Man based architect and urban designer notes: "Castletown has a good existing life in public space and event organisation that make the town already lively and pleasant for its inhabitants and an attractive place for visitors.".

The work carried out to date by the Commissioners, with public workshops led by Ms Laurincova has already started a journey in the right direction.

Changing role of retail and alignment to IoM consumer aspirations

Castletown has moved beyond a desire for chain / multiple retailing and is focused on local independents, including 'pop-up' options where possible and to suit the seasons.

The town is currently exploring options to take over the running of empty buildings and looking at repurposing key spaces for food and drink uses.

Lloyds TSB and the next-door Isle of Man Bank have already been repurposed with the former supporting business start-ups in what is now known as The Square. The owners of the former Isle of Man Bank building are engaged with the Commissioners regarding future options for the ground floor activation of their building.

Accessibility

The town is a short journey away from Douglas along the A5 at approximately 10.3 miles and 20 minutes in normal traffic conditions. It is close to Ronaldsway Airport and is served by bus routes 1, 1A, 1H,2,2A,11,11A,12 and 12A with onward journeys to Port St Mary and Port Erin a short distance away. The town is also served by the Isle of Man Railway.

As with most of the coastal towns and villages, Castletown is reasonably flat and is therefore good for cycling and walking.

Spatial layout and connectivity

Castletown has already studied its spatial layout and connectivity looking at how best to connect points of interest, meeting points and 'hidden gems'. The town has very good connectivity based mainly on the old medieval street patterns that were developed for use by foot and horses rather than the motor vehicle. The retention of this heritage network not only makes for good connectivity and permeability through the town, but also enhances its character.

Culture, Leisure, Events, Seasonality and Tourism

The history and heritage assets in the town are key cultural icons in this former Island Capital. There is already a programme of events and activities with various social clubs. The diverse range of business occupiers, popular food and beverage offers are already brining a vibrancy to the town outside of the summer season. Further resource support may be required to keep ideas fresh. Some events and activities may work, other may be less successful. Setting and funding a revenue budget to support ongoing programming of the public realm should be considered and is one aspect to be looked at for all the towns and villages.

Local Vision and Aspirations and Opportunities in relation to national vision and strategy for the Island

The Town Commissioners have a strong sense of the future they wish to create, and we define their strategy as 'starting by starting'. A funded programme of events, activities and some further property acquisition will be required for the success of Castletown to grow and inspire other places.

One of the legs of the Island Plan is Vibrancy. Castletown has started to deliver on this core plank of Island policy.

Fig 31. The main square in Castletown (Image Didobi)

ENGAGEMENT

Our visit to the former Manx capital was one of the highlights of this project and we met with the lead on key projects for the local authority, Lee Wylie. Castletown was the only place we visited that had a clear vision and we were presented with proposals by urban design consultant Betty Laurincova.

This included plans to make Castletown a 15-minute town, develop the harbour for street food markets and events, and introduce more pedestrianisation. We were also given a tour of the town by Wylie and further discussions were held over their plans to create more events in the square, introduce beach huts and convert a toilet into a tapas bar. These interventions supported a broader vision for Castletown to become "the foodie capital of the Island".

This was driven largely by a recognition that high streets can longer depend on just retail for their raison d'etre and that food and drink, leisure, culture and health are driving a new model. "We want to create a community space where people feel they're welcome," explained Wylie.

We discussed, among other things, the progress they had made in opening up the market square for events and removing traffic, measures to support start-ups with free rent and plans to convert a Barclays Bank into a local produce hall containing a butcher, baker and green grocer among other traders.

Wylie was particularly keen to support events and ensure the town was animated through music, buskers, big screen showings of sports events and a host of activities that would create a carnivalesque atmosphere.

Notwithstanding this ambitious vision, there are still a number of challenges. In the winter months, footfall is low and business confidence fragile. Yet this is a town with a lot of heritage, history and stunning views. If Wylie's plan is to be realised there could be considerable opportunities to grow the local economy and attract more visitors.

We also spoke to a number of businesses in the town and, while trading conditions were seen as challenging, people felt there were opportunities as well.

"They're (IoM Government) changing National Insurance, which means as an owner manager I'll need to pay it. I earn between £2.50-3 an hour after I've paid rates, rent and bought stock. This business has been going for 16 years and we bought it 13 years ago.

"The difference now is that there's a third of the footfall than there was then. It's massively down. There's so much history and heritage in this town that we should capitalise on with more traditional shops like ours...the butchers closed down.....people socialise in the square but don't come down this way. I don't think I'll still be here in five years' time."
Memory Lane Sweet Shop

"We have been open for three years. The square is not sufficiently inviting....with the loss of the butcher and the bank there's no incentive for people to come into the town.......events in the square are good but often it's just a big beer garden with noise and rowdy behaviour.... they need some traffic calming on this corner.....a few more shops....things to keep people in Castletown..... the Christmas decorations were nice but we need more lighting generally....there is money here, we sell £950 Chanel glasses but also £50 frames so it's about attracting those people with money into the town."
Charlotte Sadler Opticians

CONCLUSION

While there is still work to do as noted by retailer comments, Castletown is already making good progress in terms of town vibrancy. Local leadership is engaging with the community and making things happen. The town is vibrant and has the will and drive in place to do more. Initiatives here need continued support as an active programme will need refreshing as the years go by to keep the town fresh and relevant.

RECOMMENDATIONS

Given the ongoing work in Castletown our recommendations are:

Continue with the planned work of place activation and connectivity.

Continue with the plans to repurpose Barclays Bank and return the building to its original use as an indoor market promoting local produce – linking this to food-based events across the town and especially the use of the harbour.

Develop a programme of projects linked to the outcomes of the engagement with local people carried out over the last three years with business cases / costs to enable the case to be made for resource support.

Create a property owners / business owners forum starting with key buildings, mainly owned by public or charitable bodies that helps to build relationships that ensure the activation and use of otherwise closed properties. If successful, wider membership could be drawn in, including key owners of properties on Arbory Street and Malew Street.

Investigate partnership working with Port Erin and Port St Mary given the degree of interdependency between the settlements.

PLACE STANDARD REVIEW

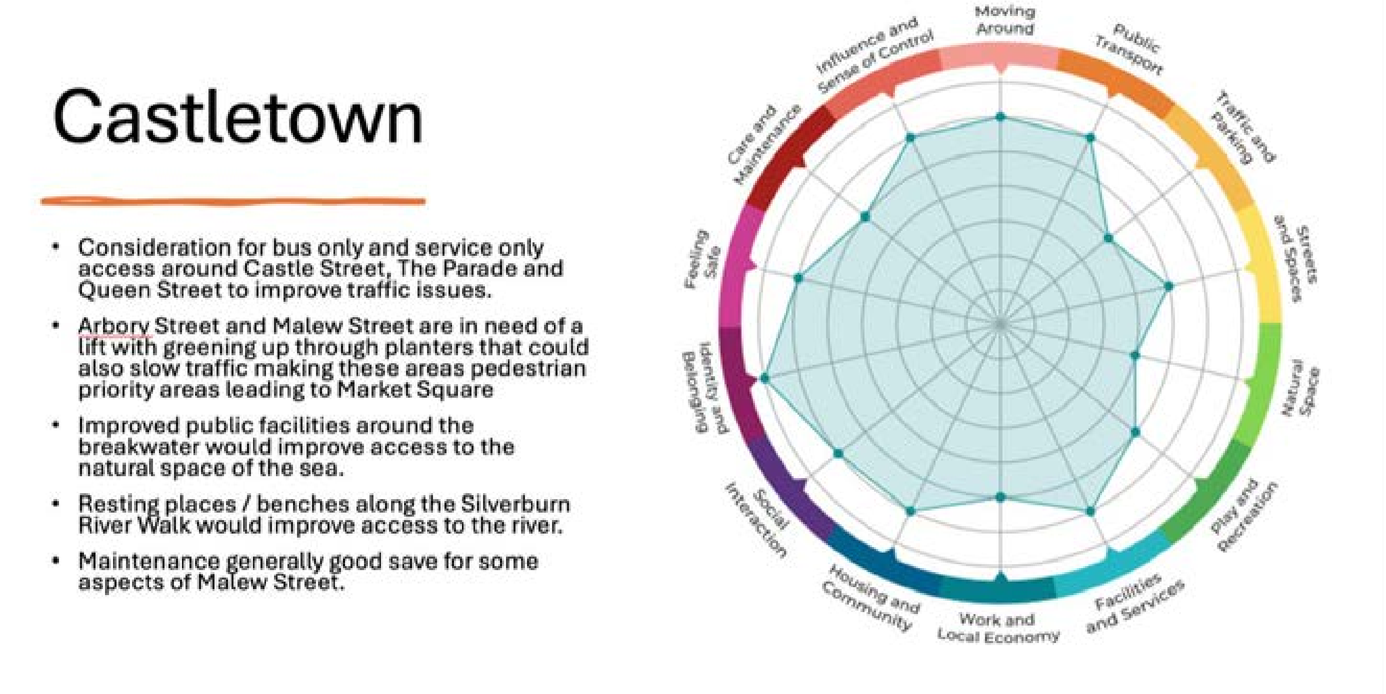
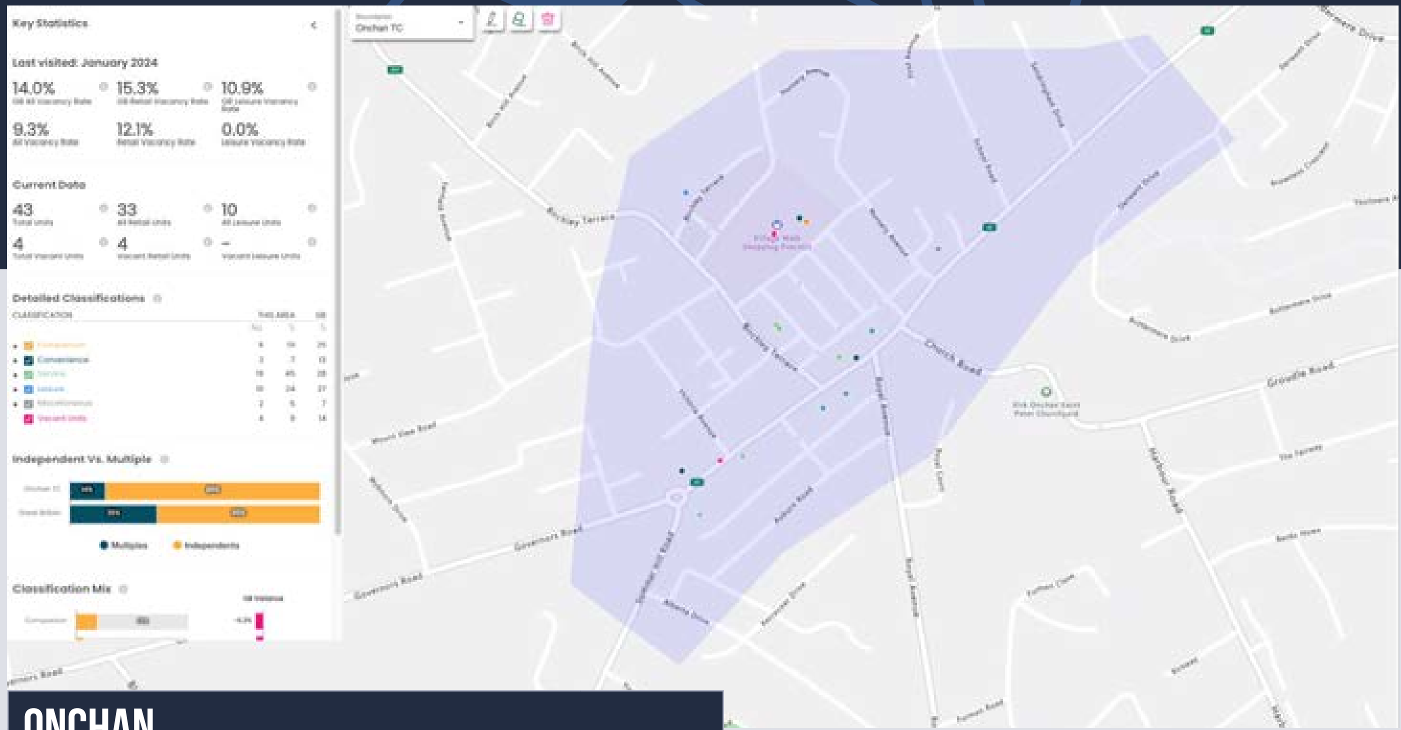


Figure 33. Place Standard outputs for Castletown (Source www.ourplace.scot)

ONCHAN

Onchan lies at the northern end of Douglas Bay and is a settlement which is contiguous with the City of Douglas at its northern and southern points. It is classified as a village and has its own administration, The Onchan District Commissioners. After Douglas, it is the second largest settlement on the Island with a population of 9,039[30]. Onchan is mainly a residential suburb of Douglas. Onchan has a small but high value industrial area with the manufacture of aviation actuation products.

[30] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022



ONCHAN	
Retail and Leisure Units	43
Retail Units	33
Leisure Units	10
Vacant Retail and Leisure Units	4
Vacant Retail Units	4
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	9.3%
Retail Vacancy Rate	12.1%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	8
Convenience Retail Units	3
Service Retail Units	19
Leisure Units	10
Population	9,039
Population to Retail and Leisure Units ratio	210

Figure 34 (Top). Onchan overview on Local Data Online (Source Local Data Company)

Figure 35. Onchan retail and leisure units overview (Source Local Data Company)

UNDERSTANDING MANX PLACES

Onchan is a medium sized town. It has a significant working age population with more 2 person households than towns in other clusters. It has a high car ownership a high home ownership. It is reliant on Douglas for employment.

Onchan is a dependent town. A similar Scottish town is Portlethen - https://www.usp.scot/Town?mainTownName=Portlethen and on the Isle of Man are Port Erin, Peel and Laxey.

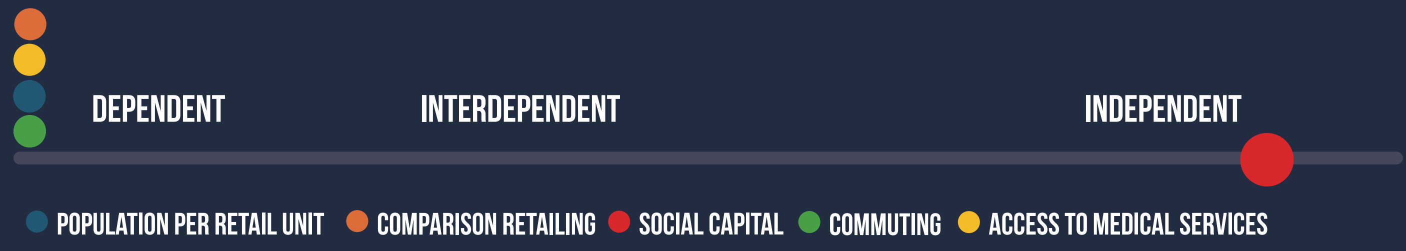


Figure 36. USP interrelationships classification for Onchan

Existing Offer and Amenities

The village has a good range of local amenities. These are all fully listed on the Commissioner's website[31] and include, banks, post office, medical centre, pharmacies, local library, a youth centre – The Hub, dental practices, community hall hire, and public conveniences.

Convenience shopping is catered for with a Shoprite supermarket, soon to become Tesco. There is a Co-Op convenience store on Main Road. The overall retail offer is described in the LDC reports above. The retail offer is provided for both on Main Road and the Village Walk Shopping Centre.

There is a cinema offer in the form of specific screenings at the St Peter's Church, and periodic concerts at Onchan Methodist Church.

The wider offer includes, Onchan Park (including an off-road raceway), a small beach at Onchan Harbour, golf at King Edward Bay Golf Club.

Key attractors and identity/sense of place

Onchan's main attraction is Onchan Park. Other attractions include Onchan Wetlands and the Groudle Glen Railway. Onchan's identity is less distinguished from the other towns and villages on the Island given its suburban feel. However, you know that you are in Onchan and not somewhere else.

The village hub, while not one single place (as it is spread between The Village Walk Shopping Centre and Main Road), is clearly on Main Road between the Methodist Church to the northeast and the junction with Governor's Road to the southwest.

Socio demographics – offer for young, working age and retired populations

Of the 9,039 population, some 47% are approximately working age (between 20 and 59) and the over 60s represent 32% of the population[32]. The offer within the village provides a good range of activity and amenity for a residential suburb. With the proximity of Douglas, Douglas's catchment clearly includes Onchan.

Alignment of offer to achieve sustainable population growth

The village or area of Onchan is a very pleasant residential area with a direct relationship with Douglas in terms of employment for the working age population. There is a variety of housing types, and it is noted that there are development sites reserved to the north of Onchan as set out in the Area Plan for the East[33].

The existing Shoprite store will no doubt receive a refresh as part of its conversion to Tesco. However, the Village Walk Shopping Centre is feeling dated and does require a refresh both in its public realm and occupational offer to maintain and improve the attractiveness of Onchan as a location in which to reside especially for any targeted younger demographic in terms of planned inward migration.

[31] https://www.onchan.org.im/public-information/local-amenities

[32] https://citypopulation.de/en/isleofman/admin/middle/24__onchan/

[33] https://www.gov.im/categories/planning-and-building-control/planning-policy/development-plan/area-plan-for-the-east/

Figure 38. Village Walk – Onchan (Image Didobi)

Figure 37. Onchan shopping centre (Image Didobi)

Accessibility

Onchan is accessible by road with the A2 to Douglas. It is contiguous with Douglas and therefore the local road network provides good accessibility. Main bus routes 1,1A,3,3A,11,12, 15 and 22 provide connectivity to Douglas and surrounding areas with route 3/3A to Ramsey. The Manx Electric Railway also serve the area to the south at Derby Castle Station which is a terminus point for the railway and Horse Drawn Tram to Douglas.

Culture, Leisure, Events, Seasonality and Tourism

The combination of local events, clubs, societies, parks, and public open spaces as noted above together with the proximity of Douglas provide cultural and leisure offers. Local services are year-round serving the local resident community. Some seasonality / tourism aspects may relate to activities at Onchan Park however this is not seen as an area for concern, unlike other towns and villages on the Island.

Leading and driving a vision and strategy for the Island working in partnership, the Government Departments could collaborate with the Commissioners and engage the local community (business and resident) to develop a programme of improvements based on the Isle of Man Plan – Our Island Plan[34].

Future housing developments should be delivered for a mix of tenure including affordable housing products and should be sustainable in terms of energy use.

[34] Isle of Man Government - Our Island Plan https://www.gov.im/islandplan

CONCLUSIONS

Onchan is effectively a suburb of Douglas despite 'village' status. The Commissioners are clear about what Onchan has to offer. It is an attractive place to reside, close to and contiguous with Douglas.

RECOMMENDATIONS

Working in partnership with the Commissioners and local business and residents develop a programme of improvements based on the Isle of Man Plan – Our Island Plan.

For the Enterprise Department to work with the landlords of Village Walk to determine options of centre improvement including the possibility of managed workspace / co-working space for the vacant office space within the centre to not only deal with vacancy but help drive footfall and vibrancy in the centre and Main Road.

PLACE STANDARD REVIEW

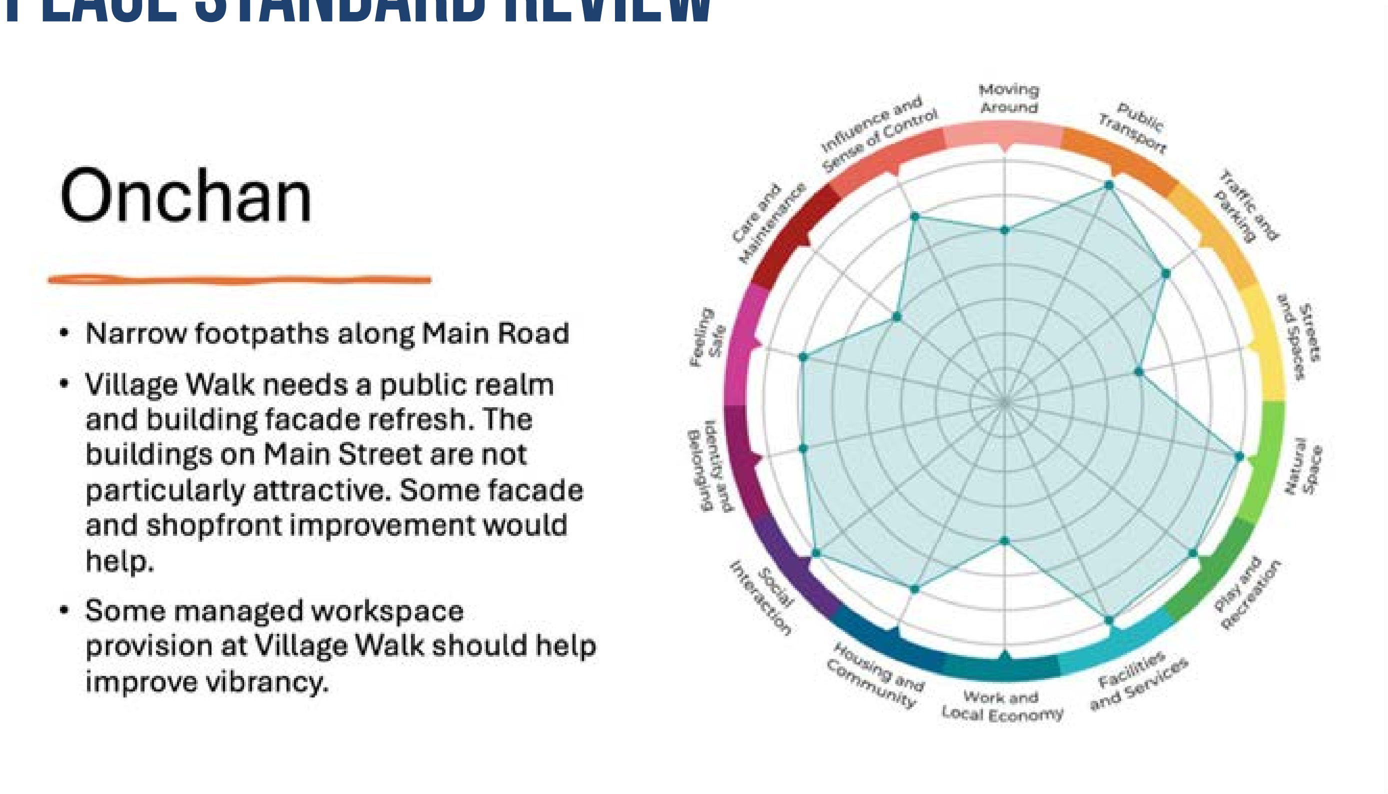
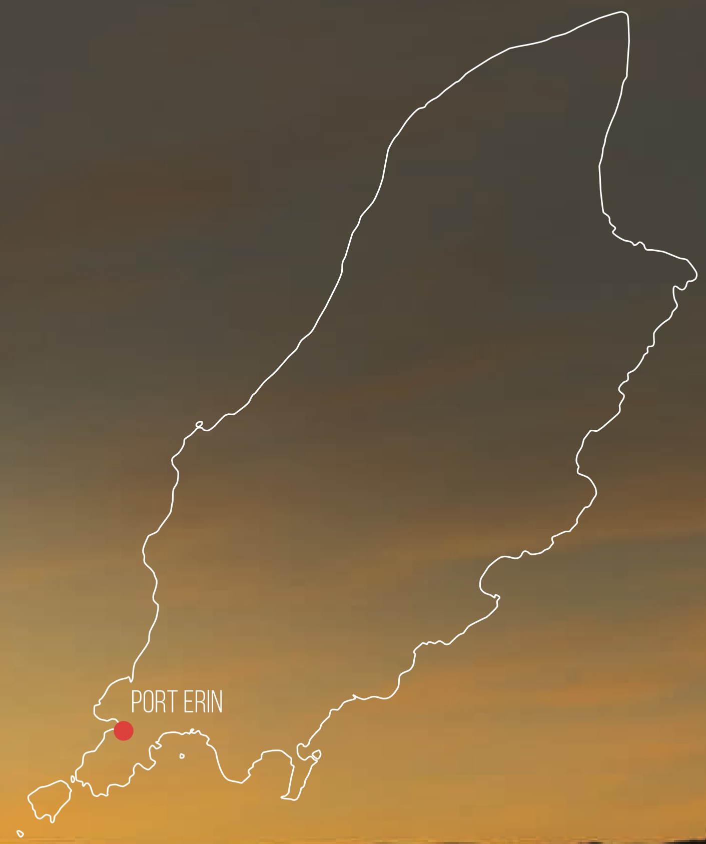


Figure 39. Place Standard outputs for Onchan (Source www.ourplace.scot)

PORT ERIN

Port Erin in the southwest of the Island has a population of 3,730[35]. Mainly residential, the village has proximity to Port St Mary and there is a degree of interdependency between the two places. It is predominantly a seaside holiday resort.

[35] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022



PORT ERIN

PORT ERIN	
Retail and Leisure Units	67
Retail Units	54
Leisure Units	13
Vacant Retail and Leisure Units	5
Vacant Retail Units	5
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	7.5%
Retail Vacancy Rate	9.3%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	24
Convenience Retail Units	7
Service Retail Units	20
Leisure Units	18
Population	3,730
Population to Retail and Leisure Units ratio	56

Figure 40 (Top). Port Erin overview on Local Data Online (Source Local Data Company)

Figure 41. Port Erin retail and leisure units overview (Source Local Data Company)

UNDERSTANDING MANX PLACES

Port Erin is a small town. It has a higher proportion of older working age persons and more two person households than other clusters. In this cluster car ownership is higher as is home ownership. It has been growing faster than any other town on the Island. Port Erin and Port St Mary share some services including the health centre.

Port Erin is an interdependent to dependent town. A similar Scottish town is Portsoy - https://www.usp.scot/Town?mainTownName=portsoy and on the Isle of Man are Peel and Laxey.

Figure 42. USP interrelationships classification for Port Erin

Existing Offer and Amenities

The village is sufficient in local amenities for the local population and surrounding settlements including Port St Mary.

Convenience shopping is catered for with a Shoprite supermarket, soon to become Tesco. There is a Co-Op convenience store on Station Road. The overall retail offer is described in the LDC reports above. There is a retail circuit or retail block between the streets of Station Road, Church Road and Bridson Street. Bridson Street links this main retail circuit with the large Shoprite store and the shopping parade that includes the village library. The hardware store on Bridson Street feels out of place, however it provides a retail link along Bridson Street between the two distinct centres of activity, the high street circuit and the Shoprite store. It is noted that the hardware store occupies a former lounge bar.

The village has a beautiful setting with the beach and bay bounded by two headland points. This asset needs to be part of the wider visitor economy strategy of the Manx Government and partnership working between the Commissioners, local business and the government should help to realise and bring about an improved offer.

The seeds of investment are being realised with the renovation of The Falcon's Nest Hotel and plans for delivering a new beachside venue, The Cosy Nook.

A range of events, activities, clubs and societies include the rugby club – Southern Nomads, tennis, golf, bowling and Rushen United Football Club.

The village boasts an Arts Centre, The Erin Arts Centre (www.erinartscentre.com). The centre is a performing arts venue, cinema and gallery.

Key attractors and identity/sense of place

Port Erin with is sandy beach, and bay framed by the two headlands is the key attractor to the village giving the place its identity and sense of place. As with Port St Mary, there is no obvious central point or 'heart' of the village. The village is also the western terminus of the Isle of Man Steam Railway with railway museum.

Socio demographics – offer for young, working age and retired populations

Of the 3,730 population, some 47% are approximately working age (between 20 and 59) and the over 60s represent 20% of the population[36]. The 10- to 19-year-old population is 10% of the overall population at 376. The combination of the amenities and offer between Port Erin, Port St Mary and Castletown cater for the requirements of the various demographic groups.

For most of the population, the bars, restaurants, clubs, societies, rugby, football and the cultural offer at the arts centre make up most of the offer.

[36] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022

Alignment of offer to achieve sustainable population growth

The natural assets of Port Erin do present an opportunity for the Island to improve the overall visitor economy. Visitors to the Booking.com platform find very little on offer. Given the former glory of Port Erin as a holiday destination, this is something to explore in partnership with local businesses, the Commissioners and the Manx Government.

Providing the strategy for the Visitor Economy is delivered, then increased demand should enable improvements in the quality of the village. However, it may need some initial risk capital to provide improved facilities in the first instance to spur demand, such as quality accommodation around the bay. A partnership between settlements could bring together a unique offer playing to the strengths of place, beach and seaside activity in Port Erin along with railway heritage and golf, with sailing, diving and other marine activity at Port St Mary, with heritage and food offers in Castletown. As stated for other places the offers where possible could be linked to the UNESCO Biosphere status of the Island and drive for more Eco Tourism visits.

Accessibility

Port Erin is accessible by road with the A5 to Douglas, some 14 miles away and approximately 30 minutes by car. The north is accessible via the A29/36. Bus routes 1, 2, 11and 12 serve the village with linkage to Port Erin and Castletown. The railway also terminates at Port Erin.

Spatial layout and connectivity

The village is a settlement laid out to the north and south of Station Road, the main access road, leading to the beach and Promenade. Station Road has good connectors with streets serving the village and forms part of the main retail centre.

Culture, Leisure, Events, Seasonality and Tourism

As a seaside village, seasonality is an issue that forms a barrier to investment as recognised by the Manx Government. The culture and heritage offer in terms of

Figure 43. Cosy Nook Café in Port Erin (Image Sunshineramsey71)

the railway is also seasonal. The Erin Arts Centre provides an all-season programme of cultural events. Sporting activity, clubs and societies also provide year-round leisure activities and events.

Opportunities in relation to national vision and strategy for the Island

Working in partnership, the Government Departments could collaborate with the Commissioners and engage the local community (business and resident) to develop a programme of activity and ultimately investment based on the Island's Isle of Man Visitor Economy Strategy 2022-2032 especially the following programmes:

Programme 2 – Quality Improvement
Programme 3 – Visitor Accommodation Transformation
Programme 4 – Visitor Product Development.

The seafront areas of the village could host a UNESCO Biosphere visitor centre linked to the wider sustainable visitor economy strategy development.

In terms of retail improvement, more local artisan businesses such as Soaral – The Isle of Man Fragrance Company on Church Road are examples of new businesses that not only serve the Island community but also can be attractors for the visitor economy again mitigating the negative effects of seasonality.

Local Vision and Aspirations & Leadership and governance

It is interesting to note that there is a collaborative initiative between the Department for Enterprise, Port Erin Commissioners and Port Erin Traders Association to promote the village under the Visit Port Erin brand. This provides a good foundation for the work described above.

As stated for Port St Mary, given the proximity of Port Erin and the interdependency between Port Erin, Port St Mary and Castletown, partnership working between the three settlements should be investigated where each place could play to its strengths in support of the other and not to compete or worse still cannibalise opportunity.

Fig 44. Community engagement taking place in Port Erin (Image Didobi)

ENGAGEMENT ACTIVITIES

We met with members of the local authority (including Chair Jason Roberts) and discussions largely focussed on the Council's efforts to improve Port Erin and the challenges they face. The key points are summarised below.

They are a proactive local authority and have significantly increased their commercial portfolio over the last 10-years. They have a gym in the village, they are repurposing an old depot into a microbrewery and tap bar, and they are in the process of turning a beach-side cottage into a bar. They have also bought some land on the outskirts of the village and are turning it into a glamping/campsite.

They benefit from tourism and get a fair amount of coach tourism. They also benefit greatly from the TT races but believe there are opportunities to unlock even more tourism potential.

They don't have a clear vision – but do have a number of plans and have carried out consultations.

They see themselves as an interventionist authority and have a clear strategy of trying to improve the town through the work of committed entrepreneurs. "We are not into empire building and buying everything, but when we go through lease assignments we try and get the right kind of people with dynamism and a positive attitude as opposed to someone who is going to pay the most rent."

They don't have any more brownfield sites but are looking to grow their housing offer through new apartments on the site of the former Ocean Castle Hotel.

They have quite an elderly population (40% are over 60) but there are quite a lot of families and a sizeable population of young people too.

They don't have a school in their boundary.

Church Road needs to be improved. "It's really drab. There are some empty shops and we don't own any of the properties." A former food store has been empty for several years. "This is the largest unit and it's been empty for 7-8 years now. The landlord is asking for £60,000 rent a year and they can't fill it."

Driving change is difficult. "The c word is like mud. If you want to change anything it's hard."

Port Erin has an active trade association and they have good links with the Commissioners.

Events are a key driver of footfall and they run a good selection ranging from Easter and music events to a festival of beach and sea, and also a vintage day. But they would like to develop this programme, as there is an appetite for more events.

They also have a good sports and leisure offer – with golf, tennis, football and volleyball offer.

Port Erin is not without its social challenges, however. "Loneliness is an issue here."

There are also challenges to keep key services running – and they are currently looking for a new postmaster to run the village post office.

They have a strong third sector with organisations like Southern Befrienders, Manx Care, Beach Buddies and men in Sheds doing invaluable work.

Following this meeting, we also spoke with a number of traders and business confidence seemed fairly buoyant. A representative sample of their feedback is listed below.

"Business has never been better. We have been here for four and a half years in these premises (they were a few units down before that), and we're moving across the road to the old swimming pool site. I live in Port St Mary. There is a Port Erin Traders Group, the problem is it always meets at 6.30pm and when you finish at 5 and live in Peel it's not worth hanging around for 90 mins. We'd go if it was earlier."
Hardware Store, Ken Quine (Store Manager)

"Business is good and we have a lot of loyal customers. The town could do with a good coffee shop and there used to be a milk bar tearoom that everyone use to go to...we need somewhere like that that does afternoon tea and things."
S&M Harrison (Shoe Shop)

"We've been going for 10-years and business is going really well (recently moved to a bigger unit)."
Franklins Bike Shop

CONCLUSIONS

Despite some issues raised by the Commissioners, business sentiment is positive. The current investment in the refurbishment of the Falcon's Nest Hotel indicates a clear degree of business confidence and recognition of the opportunity to provide improved accommodation given our observations above.

The village has the attributes to become a key visitor destination provided that a clear medium to long term development strategy is developed in line with the Visitor Economy Strategy 2022-2032 referenced above.

RECOMMENDATIONS

Government Departments could collaborate with the Commissioners and engage the local community (business and resident) to develop a programme of activity and ultimately investment based on the Island's Isle of Man Visitor Economy Strategy 2022-2032 especially the following programmes:

- o Programme 2 – Quality Improvement
- o Programme 3 – Visitor Accommodation Transformation
- o Programme 4 – Visitor Product Development.

The above work to investigate the development of a small UNESCO Biosphere visitor centre possibly on Station Street or within the strip mall off Bridson Street, linked to the library.

Alternative uses should be considered for Church Street to start to address the current dilapidated nature of the street, with a focus on retail on Station Road and Bridson Street.

PLACE STANDARD REVIEW

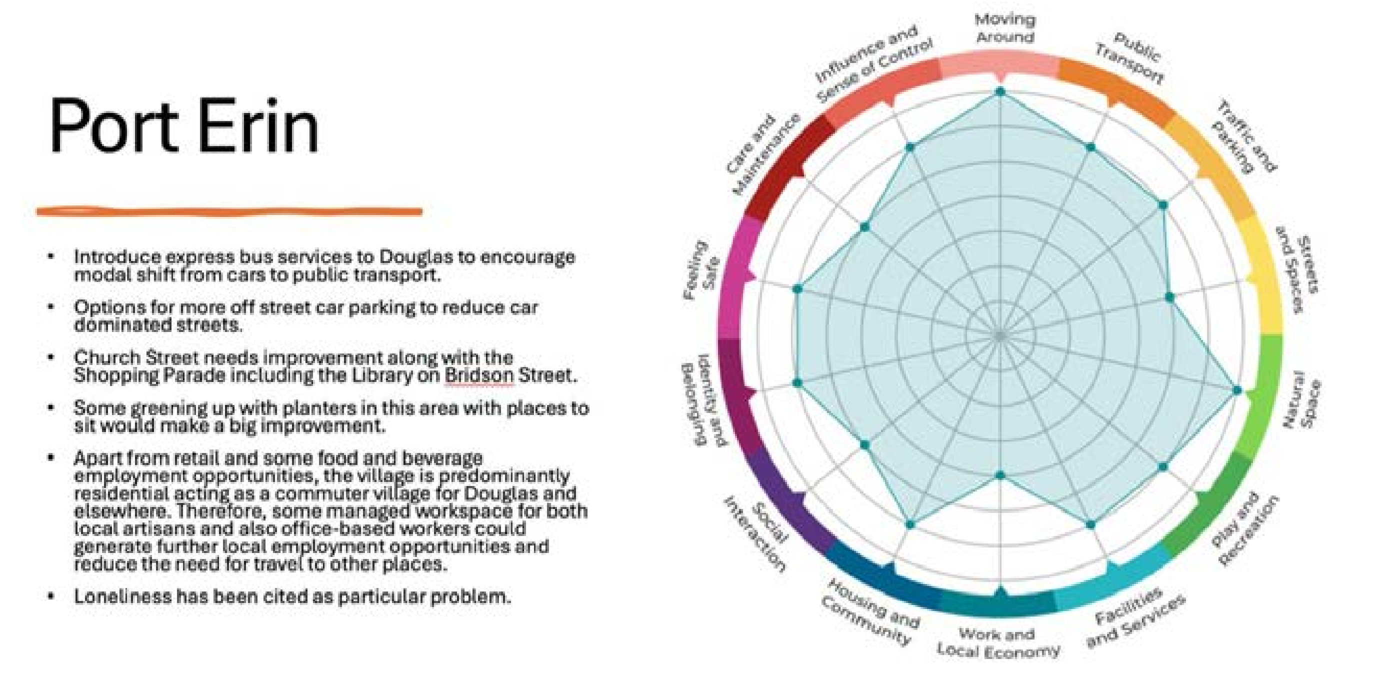


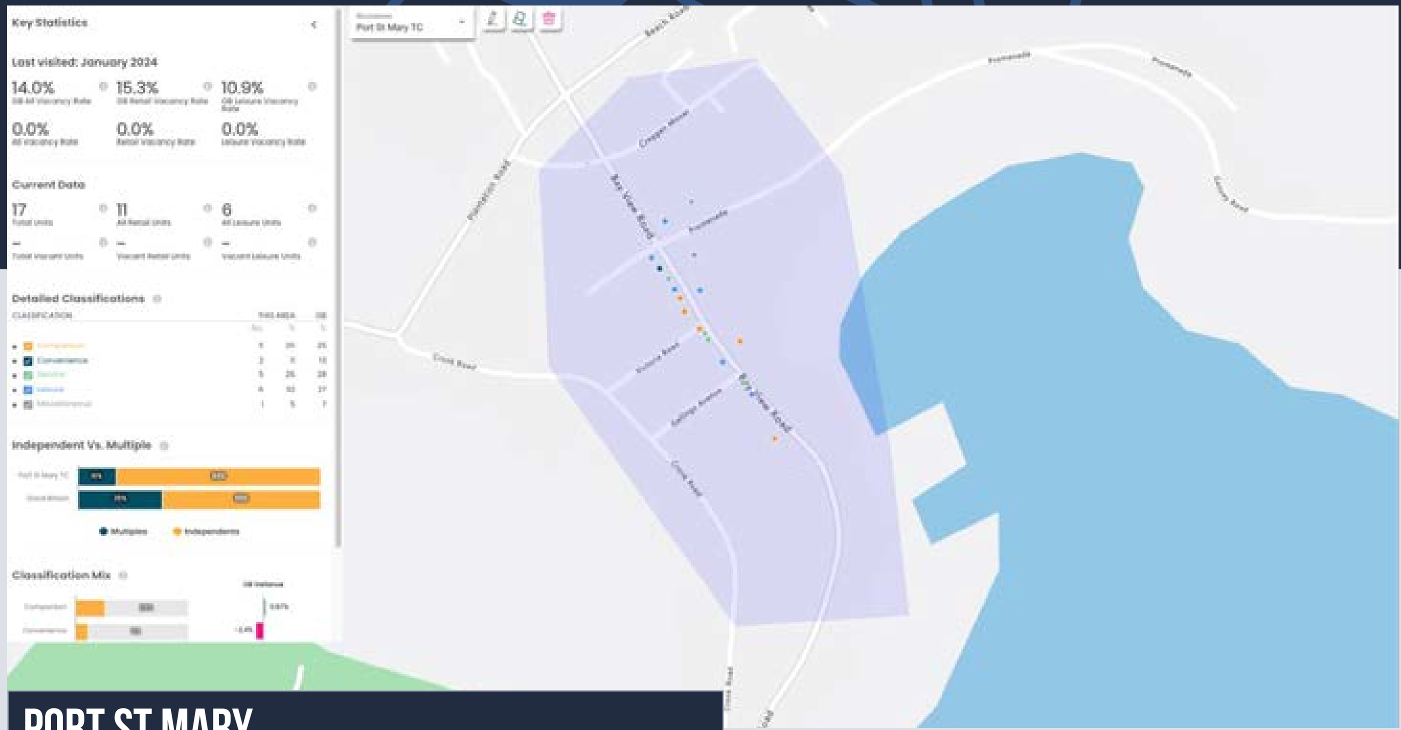
Figure 45. Place Standard outputs for Port Erin (Source www.ourplace.scot)

PORT ST MARY

Port St Mary in the southwest of the Island has a population of 1,989[37]. It is a village that is mainly residential in character with a reasonable selection retail or hospitality outlets given the size of the community.

It is predominantly a sailing and dive centre and is home to The Isle of Man Yacht Club. Fishing was once the mainstay of the local economy; however, the famous 'queenie' scallop is still processed in the village (see Crofters[38]).

[37] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022
[38] https://www.crofters.im/



PORT ST MARY	
Retail and Leisure Units	17
Retail Units	11
Leisure Units	6
Vacant Retail and Leisure Units	0
Vacant Retail Units	0
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	0%
Retail Vacancy Rate	0%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	5
Convenience Retail Units	2
Service Retail Units	5
Leisure Units	6
Population	1,989
Population to Retail and Leisure Units ratio	117

Figure 46 (Top). Port St Mary overview on Local Data Online (Source Local Data Company)

Figure 47. Port St Mary retail and leisure units overview (Source Local Data Company)

UNDERSTANDING MANX PLACES

Port St Mary is a small town. Towns in this cluster have a more elderly population, many living on their own. A higher proportion are retired than in other clusters. It has been increasing in population since 2016. Port St Mary and Port Erin share facilities including the health centre.

Port St Mary is a dependent town. A similar Scottish town is Burghead - https://www.usp.scot/Town?mainTownName=Burghead and on the Isle of Man is Castletown.

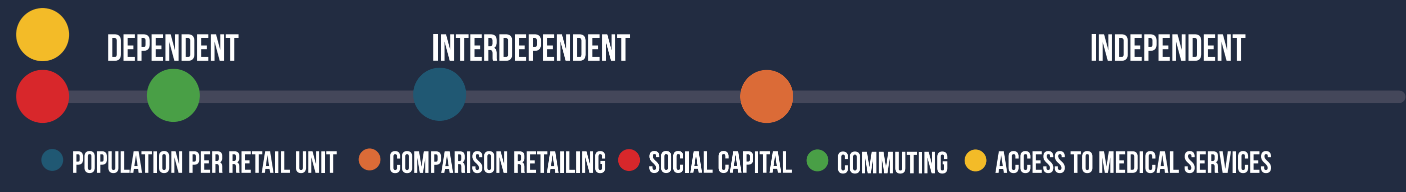


Figure 48. USP interrelationships classification for Port St Mary

Existing Offer and Amenities

The village is sufficient in local amenities, with Town Hall and community hall, primary school, convenience shopping, village pubs and leisure facilities such as sailing and diving, and golf. There is some interdependency on Port Erin and Castletown. For example, the medical centre is situated just north of the village which also covers Port Erin.

Key attractors and identity/sense of place

As with most places on the Isle of Man, the village of Port St Mary does have a clear identity and sense of place afforded by the topography and the stunning view of the bay and Chapel Beach on entering the village. The retail outlets are mainly situated on Bay View Road and further into the village, High Street is mainly residential. There is no clearly identifiable 'heart' of the village, however the area around Athol Street and The Quay at the harbour does provide the opportunity to make more of the location as a central meeting space and place.

Socio demographics – offer for young, working age and retired populations

Of the 1,929 population, some 43% are approximately working age (between 20 and 59) and the over 60s represent 40% of the population[39]. The 10- to 19-year-old population is 8% of the overall population at 160 and provision for this age group looks lite, however given the interdependency with Port Erin and Castletown, overall facilities in the region cater for this demographic.

[39] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022

For the majority of the population, the bars, restaurants, sailing club, club house, and gold glub make up most of the offer. The Town Hall gets booked out for community events and activities such as weddings, parties, band nights, murder mysteries, amateur dramatics, children's parties, computer and arts groups[40].

Alignment of offer to achieve sustainable population growth

Depending on lifestyle choices, Port St Mary could be attractive for some of the target demographic, however, it is our view that the overall offer needs to improve. For example, the range of shops on Bay View Road, even if adequate look unattractive and unappealing to a visitor, especially when compared to competitive destinations.

Businesses such as Ventosus Micro Winery on Athol Street (https://ventosus.co.uk/) are the new businesses that will 'lift' the overall offer of the village.

Providing the strategy for the Visitor Economy is delivered, then increased demand should enable improvements in the quality of the village. However, it may need some initial risk capital to provide improved facilities in the first instance to spur demand, such as quality accommodation around the bay and harbour, linked to sailing, diving and the marine environment in general as part of the UNESCO Biosphere status of the Island and drive for more Eco Tourism visits.

[40] http://www.portstmary.gov.im/community/townhall/

Accessibility

Port St Mary is accessible by road with the A5 to Douglas, some 14 miles away and approximately 30 minutes by car. Bus routes 1A, 2A, 11A and 12A serve the village with linkage to Port Erin and Castletown.

Spatial layout and connectivity

The village is a linear settlement along the west side of the bay. The main retail offer is at the top of the village on Bay View Road.

Connectivity and permeability through the village is good. All main routes have good connectors with side streets.

Culture, Leisure, Events, Seasonality and Tourism

In addition to the offer described above, The Port St Mary Commissioners list the culture, leisure, events and other activities in the village at http://www.portstmary.gov.im/

Local Vision and Aspirations

The Port St Mary Commissioners do have a vision for the village and an accompanying strategy[41].

Opportunities in relation to national vision and strategy for the Island

The local vision and strategy may be adequate for the status quo, however in terms of the wider development and sustainable growth aspirations of the Island, then there is work to do. Working in partnership, the Government Departments could work with the Commissioners and engage the local community to broaden the existing foundations of vision and strategy within the framework of the Island Plan. The opportunity to celebrate and develop the UNESCO Biosphere status of the Island at Port St Mary is worth further exploration with business case development.

Leadership and governance

Given the proximity of Port Erin and the interdependency between Port Erin, Port St Mary and Castletown, partnership working between the three settlements should be investigated where each place could play to its strengths in support of the other and not to compete or worse still cannibalise opportunity.

It is interesting to note that the village has a business association, The Port St Mary Business Association, which was established 2009. The Commissioners state that the Association is a key player in economic regeneration projects in the village.

Link between businesses and the community through the organisation of the Commissioners, there would appear to strong social capital in the village thereby creating the foundations for future partnership working.

Engagement

No engagement activities took place in Port St Mary. We have relied on existing data and survey information.

Figure 49. Port St Mary beach (Image Didobi)

[41] http://www.portstmary.gov.im/board-strategy/

CONCLUSIONS

Port St Mary has a clear identity, working harbour and is a centre for sailing and diving. Convenience shopping is provided for given the size of the population. The interdependency on both Port Erin and Castletown and the small population sizes of each settlement call for collaboration between the three settlements to develop their strategy in line with the Island Plan and Visitor Economy Strategy.

RECOMMENDATIONS

Ports St Mary and Port Erin, due to their proximity, should pool resources and activities to avoid duplication and competition.

Form a joint committee with Port Erin and Castletown to develop a vision, and strategy in line with the Island Plan and Visitor Economy Strategy.

PLACE STANDARD REVIEW

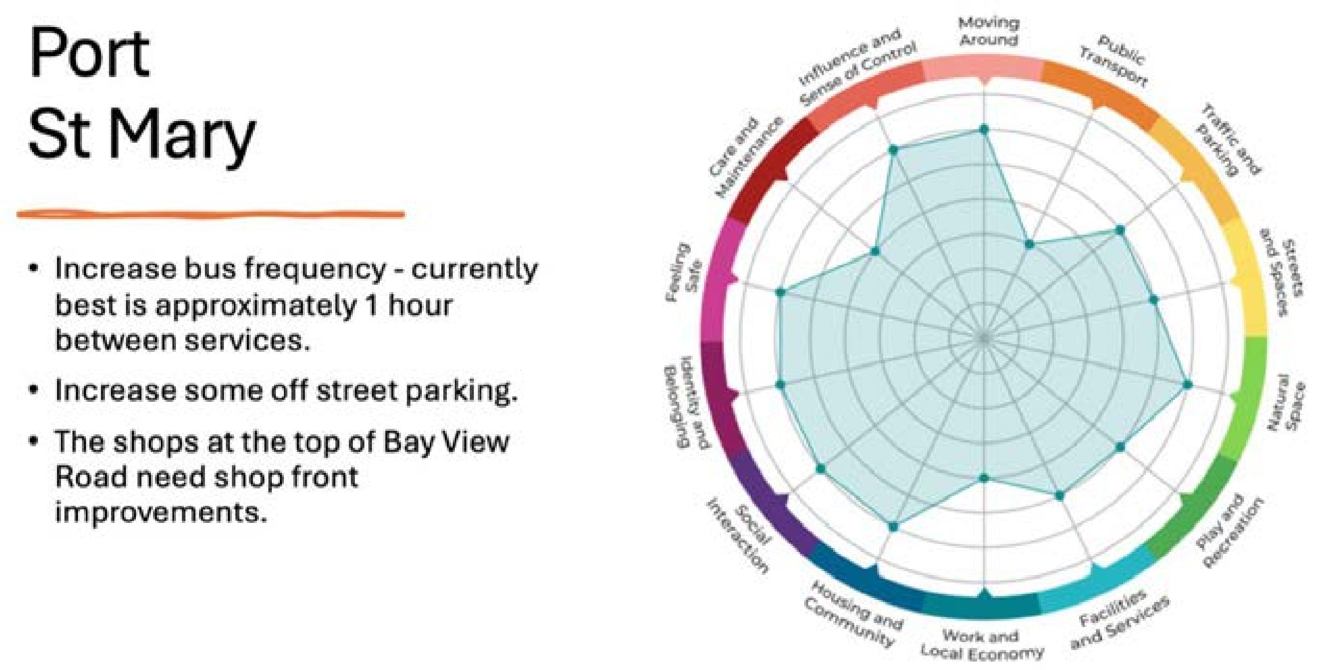


Figure 50. Place Standard outputs for Port St Mary (Source www.ourplace.scot)

LAXEY

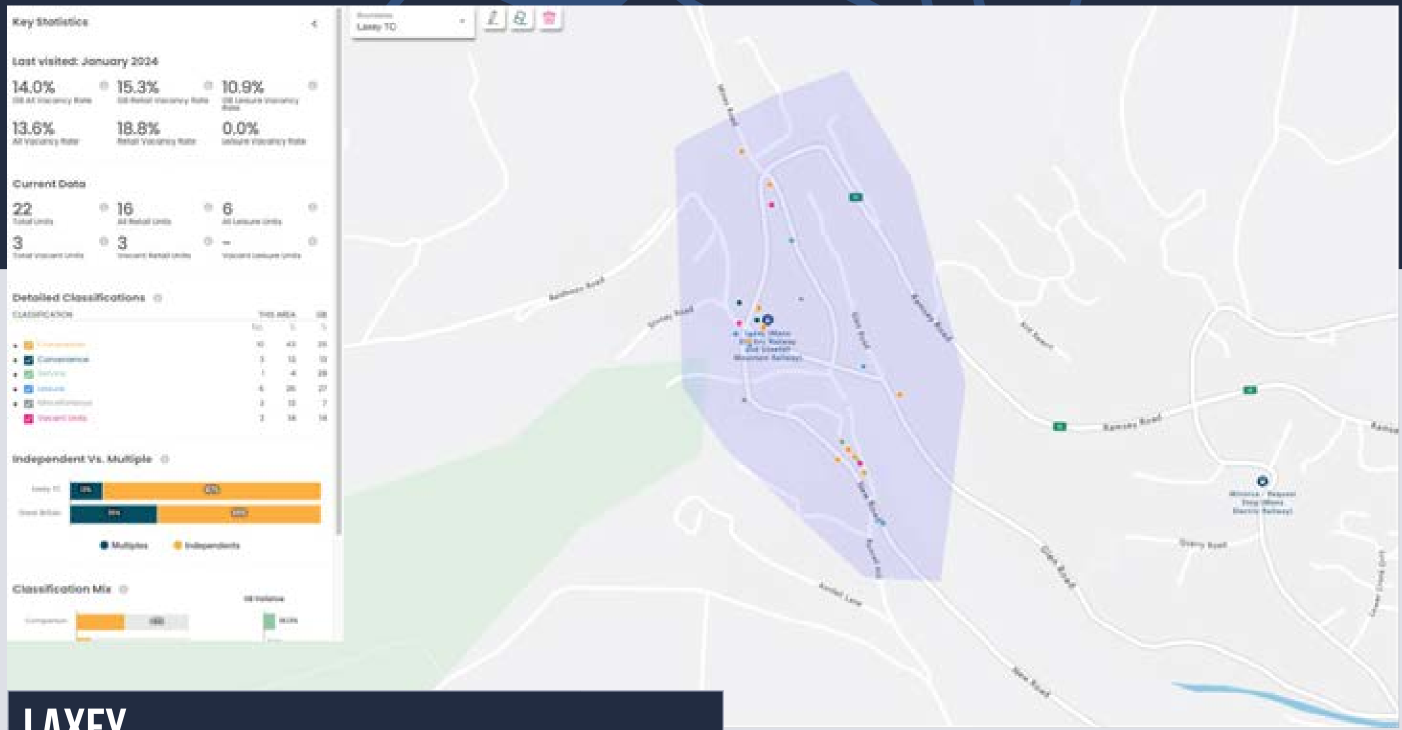
Laxey with a population of 1,656[42] is a village located on the east coast of the Isle of Man approximately eight miles from the city of Douglas.

Laxey has a picturesque setting, nestled between hills and the Irish Sea. One of the prominent features of the village is the Laxey Wheel, also known as Lady Isabella. The Laxey Wheel has become a tourist destination point originally being built in the 19th century to pump water from the mines in the area.

The village offers a tranquil environment, making it an appealing destination for those seeking a peaceful retreat. Laxey has a historic charm with traditional Manx architecture, and visitors can explore the narrow streets and local shops.

Laxey, with its unique attractions, including the Manx Electric Railway, and natural beauty, contributes to the overall appeal of the Isle of Man as a tourist destination.

[42] 2021-01-27-census-report-part-i-final-2 PDF (www.gov.im) - 2021 Isle of Man Census Report Part I Statistics Isle of Man Cabinet Office January 2022



LAXEY	
Retail and Leisure Units	22
Retail Units	16
Leisure Units	6
Vacant Retail and Leisure Units	3
Vacant Retail Units	3
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	13.6%
Retail Vacancy Rate	18.8%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	10
Convenience Retail Units	3
Service Retail Units	1
Leisure Units	6
Population	1,656
Population to Retail and Leisure Units ratio	75

UNDERSTANDING MANX PLACES

Laxey is a small town. It has higher home ownership and also higher car ownership than towns in other clusters. It has a higher working age population. Commuting to Douglas is frequent. It has decreased in size since 2016. Laxey and Onchan also share the same medical practice.

Laxey is an interdependent to dependent town. A similar Scottish town is Balmedie - https://www.usp.scot/Town?mainTownName=Balmedie and on the Isle of Man are Peel, Port Erin and Onchan.

Figure 51 (Top). Laxey overview on Local Data Online (Source Local Data Company)

Figure 52. Laxey retail and leisure units overview (Source Local Data Company)

Figure 53. USP interrelationships classification for Laxey

Existing Offer and Amenities

The existing offer although limited is sufficient for supporting the local population. The village high street with the Co-op convenience store and the EVF Petrol Filling Station provide for basic needs and serve the 'movement' economy given through traffic particularly between Ramsey and Douglas.

'Upper' Laxey is well served with food and beverage establishments. 'Lower' Laxey with The Shore Hotel, and The Shed provide a quality food and beverage offer set within the attractive glen and sea front.

Public toilet facilities exist at the three key locations in the village, upper, lower and The Laxey Wheel and car parking is ample out of season.

During the summer season traffic movements on Glen Road may detract from overall amenity and attractiveness. However, given the natural / geographical constraints, solutions maybe limited. Encouraging travel on the bus and the Manx Railway during the summer season should alleviate some traffic issues, especially with the promoted use of the South Cape stop on the electric railway for summer visitors to access the beach and harbour.

Key attractors and identity/sense of place

Laxey, with the Manx Electric Railway, Laxey Wheel, historic Washing Floors, harbour, and beach, set within the glen cut by the Laxey River, has a unique identity and sense of place.

For outsiders, the image of the Laxey Wheel are identity markers for the whole of the Island setting national identity.

The station setting for the Manx Electric Railway with Miner's Tavern, Rose Gardens and small public square provide for an attractive gateway to the village with a strong sense of place.

The Laxey Glen Mills also provide a unique working heritage asset that could possibly host a visitor centre adding to the offer of the village.

Socio demographics – offer for young, working age and retired populations

64.7% of the population is in the 15 to 64 age group with 568 persons from within the 1,656 population (34.3%) being within the 50 to 69 age group[43]. Local facilities, such as the school, the sports, and games area, travelling library, harbour for private boat moorings in addition to the offer as described above should meet local needs given the overall size of the population.

As an attractive village with proximity to Douglas, the opportunity to provide additional residential development especially targeted for young people within the infill sites identified within the Area Plan for the East[44] should be considered subject to pressures on local utilities. Town house, cottage and apartment development could be considered on the infill sites identified in the Area Plan with a shared ownership tenure offer to help deal with the affordability issues identified in the Housing Market Review[45].

[43] https://citypopulation.de/en/isleofman/admin/garff/23__laxey/
[44] https://www.gov.im/categories/planning-and-building-control/planning-policy/development-plan/area-plan-for-the-east/
[45] Isle of Man Housing Market Review 2022 Statistics Isle of Man Cabinet Office May 2023 - 2022-housing-market-report-030523.pdf (gov.im)

Figure 55. Derelict property in Laxey (Image Didobi)

Figure 56. Laxey beach front and café (Image Didobi)

Alignment of offer to achieve sustainable population growth

In terms of any targeted inward migration, Laxey offers a very attractive place for living. The natural and heritage assets are a magnet along with the food and beverage offer and proximity to Douglas and Ramsey.

Infill development as described above, where possible, should assist this particular objective regarding population growth.

Changing role of retail and alignment to IoM consumer aspirations

The changes to retail across the British Isles, especially due to structural financial issues within multiple chains and the increased role in multi-channel buying, especially through the internet has changed what retailers want to or are able to offer which is at odds at time to consumer expectation of what can be delivered.

For the Isle of Man, with a small but overall prosperous population, further work on catchment analysis and retail demand will be required to identify sales densities (in terms of £/turnover/per square foot) and therefore the viability for some UK based multiple retailers to create an offer on the Isle of Man. Such work is outside the scope of this commission.

What is possible to comment on is the potential for more 'home grown' independent businesses either catering solely for the tourist trade or local population alike.

Government grants and intervention with reluctant landlords may be necessary to bring back into use properties that are otherwise blighting the locality.

Laxey does not overly suffer from empty properties, however the empty properties near to and opposite the former bank on the main A2 road should be brought back into use, possible with ground floor independent artisan retail with living accommodation above.

Accessibility

Laxey is on the main A2 road and is served by Bus Vannin routes 3 and 3A, linking Ramey to Douglas through Laxey. The village is also served in season by the Manx Electric Railway and the rail link to Snaefell, the Island's highest point. At just under 8 miles from Douglas and just over 9 miles to Ramsey, overall accessibility is good.

Spatial layout and connectivity

Laxey is challenged by its natural topography with the settlement straddling the glen formed by the River Laxey. However, this is the reason for its local charm and unique sense of identity. The road network connects the village well at both the higher and lower levels. The beach area together with the open public space provision, provides ample 'breathing space' for the village, creating a good sense of well-being. Given the separation of Higher and Lower Laxey, better wayfinding is recommended for the visitor population along with a seasonal shuttle bus operational in concert with the railway, to assist with accessibility between the two parts of the village.

Culture, Leisure, Events, Seasonality and Tourism

The Working Men's Institute – The Institute has a calendar of weekly year-round events, such as dance, singing, yoga, exercise, dog groups and specific events through the year such as gigs and concerts. The Institute is well provided for with full PA and lighting facilities in the main hall. This is a positive asset in the village.

The Garff Commissioner's web site lists local visitor attractions and local clubs and events[46].

Opportunities in relation to vision and strategy for the Island

The overarching objectives for the Island "...building a secure, vibrant and sustainable future for our Island Nation" alongside the status of a UNESCO Biosphere are key attributes that Laxey already demonstrates. In terms of added vibrancy, the vacant buildings on the high street mentioned above could be linked to Biosphere related activity, as could some space on the beach front linking activity to the 'Big Blue Project' as in Peel[47].

Leadership and governance

The Garff Commissioners provide local leadership and governance. For the minor improvements suggested in this review, a sub-committee could be supported that develops a local plan around the three key Island Plan objectives of security, vibrancy and sustainability that is built on a community participatory activity brining to life the Island Plan and UNESCO Biosphere status.

[46] https://www.garff.im/laxey-groups-and-societies/
[47] https://www.biosphere.im/our-projects/the-big-blue-

Figure 54. Laxey tram stop (Image Didobi)

ENGAGEMENT

We visited Laxey on the morning of 9th January and spoke to a number of businesses and residents. Discussions suggested that business confidence was fairly robust and a sample of the feedback we captured is included below.

"I would like to see a better food and drink offer here. Now that we've lost the chip van, there's not much left."
Resident

"We used to have a food offering but we've lost the Chinese and the mobile chippy. Also, many takeaways don't deliver to Laxey. The bus service is good and comes every 30 mins."
The Co-Op

"Business is very good. For us, it's the busiest it's ever been following troubles with the Lloyd pharmacies in the north of the Island and Ramsey. We have taken on extra staff to cope with demand and can turn around prescriptions within two days, which is faster than elsewhere. The problem is more the availability of doctors to issue them....

"The bus network is good, so there are no obstacles to success really. People make a day of it coming here from Ramsey... I live in Onchan and people value a community pharmacy, they need things like shampoo etc, and we provide the service they need."
Pharmacy

CONCLUSIONS

There are only minor issues with Laxey, mainly the vacant buildings along the high street. Improvements to visitor attractions and keeping up to date is necessary to meet visitor expectations but also a challenge in terms of cost and seasonality. The charm of Laxey rests in its unique character and heritage. Therefore, improvements should be in keeping with local heritage to maintain the attractiveness of the place.

RECOMMENDATIONS

The formation of a development / improvement sub-committee or forum supported by central government that develops a local plan around the three key Island Plan objectives of security, vibrancy and sustainability that is built on a community participatory activity brining to life the Island Plan and UNESCO Biosphere status. The ideas developed could form the basis of business cases to be submitted for central grant funding.

Create better signage between the tram stop and the beach offer with possible consideration of transport for less active tourists. This might be a horse drawn to tie in with the heritage or even a golf buggy type offer.

PLACE STANDARD REVIEW

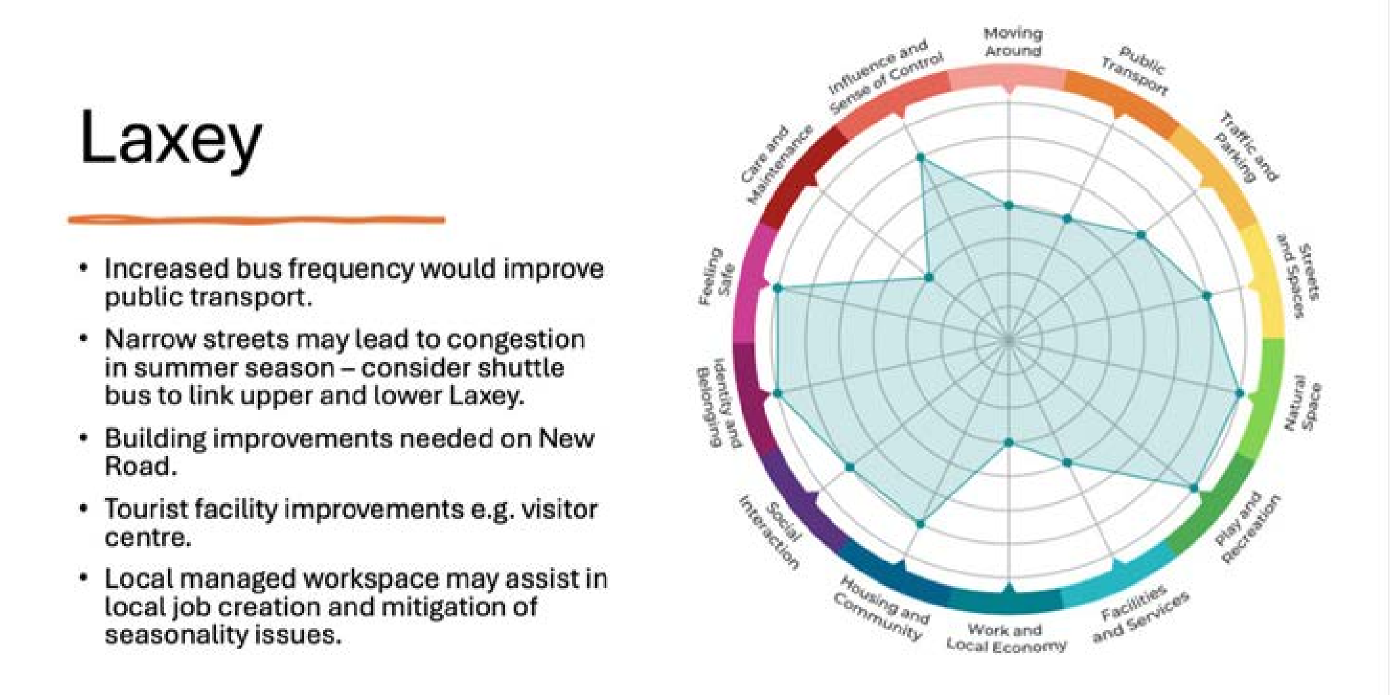
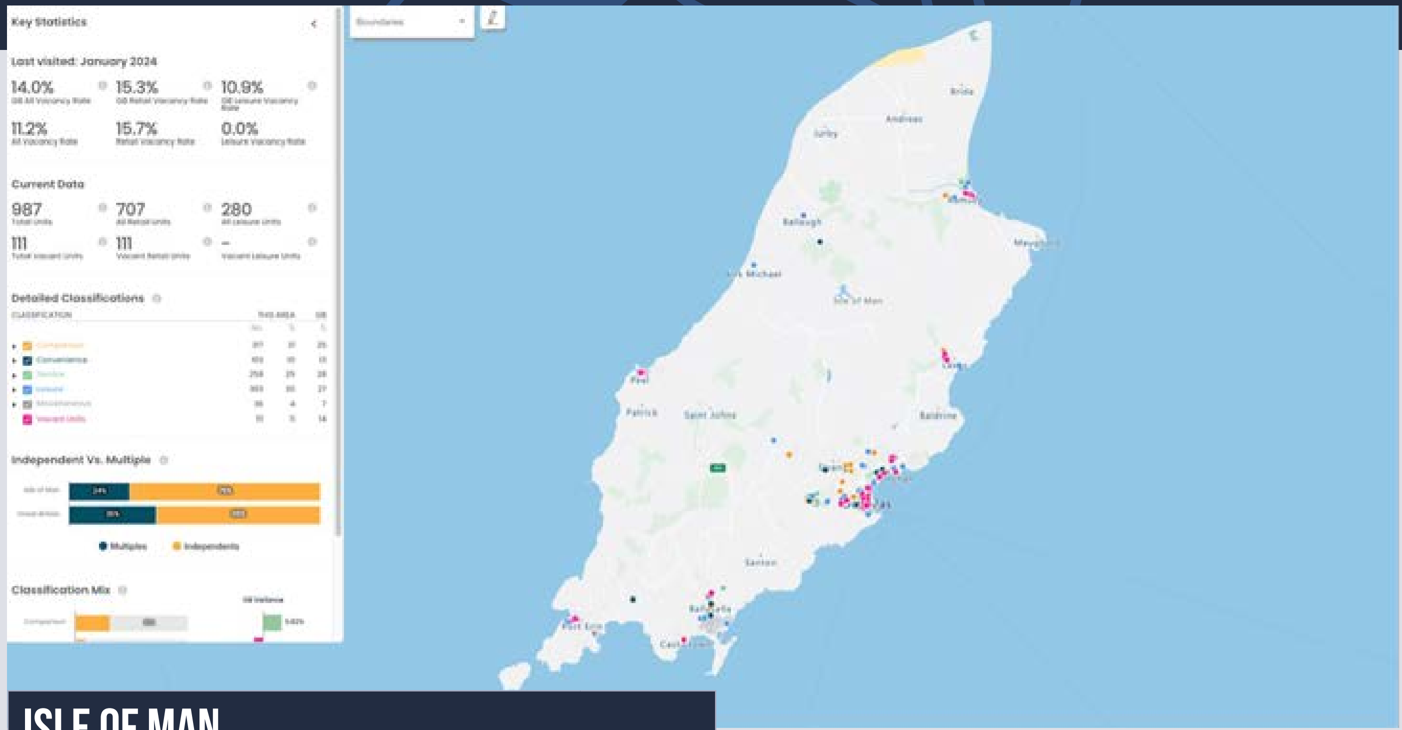


Figure 57. Place Standard outputs for Laxey (Source www.ourplace.scot)

ISLE OF MAN

OVERVIEW AND SUMMARY

ISLE OF MAN
OVERVIEW AND SUMMARY



ISLE OF MAN	
Retail and Leisure Units*	987
Retail Units	707
Leisure Units	280
Vacant Retail and Leisure Units	111
Vacant Retail Units	111
Vacant Leisure Units	0
Retail and Leisure Vacancy Rate	11.2%
Retail Vacancy Rate	15.7%
Leisure Vacancy Rate	0%
Comparison Goods Retail Units	317
Convenience Retail Units	103
Service Retail Units	258
Leisure Units	303
Population	84,069
Population to Retail and Leisure Units ratio	85

Figure 58 (Top). Isle of Man overview on Local Data Online (Source Local Data Company)

Figure 59. Isle of Man retail and leisure units overview (Source Local Data Company)
*excludes Tynwald Mills

a. Island overview and towns comparison

Introduction

The global economy is undergoing significant change. This is recognised by the Isle of Man in its current Business Isle of Man Programme with the need to adapt and modernise the enabling sectors of the economy such as property, infrastructure and transport, retail and hospitality, culture and leisure and the energy sector.

Some aspects of change have been accelerated by the recent Covid-19 pandemic, leaving a legacy of changed behaviour in the way we work and shop for example. These changes are supported by the continuing advancement of digital technologies including the rise of artificial intelligence (AI), including machine learning.

All regions of the world are facing these changes, some more acutely than others subject to the degree of diversification of their economies and local cultural behaviour e.g. a propensity to shop in local markets vs buying on-line.

Regions and localities that are best able to innovate and pivot to new opportunities will find new growth sectors until the next wave of innovation comes forward. Being prepared for change and enabling innovation to create new growth sectors mitigates the risk of economic failure and stagnation.

The Isle of Man has recognised these issues and is developing programmes to support the current drivers of the economy, while growing new sectors in the sustainability / green, data and knowledge sectors.

The focus of this study has been a town and village audit, understanding the current state of the key settlements on the Island with recommendations for improvement where necessary. The next section provides a summary of the key challenges and opportunities across all the town and village audits.

The Health of the Island's city, towns and villages

The previous cycles of economic development from mining to tourism to financial services have all left a legacy on the built environment. From the celebrated heritage assets of Laxey to the previously grand Victorian terraced villas, to the central business district office buildings of the 1980s and 90s, each dominant economic activity has left its mark.

The passing of each economic cycle has left infrastructure that has become redundant and needs removing or re-purposing. Given climate change and embodied carbon issues, re-purposing is the default presumption unless there is a compelling case for removal.

Office space that is in demand, especially in the UK, is high quality and eco-efficient. Older office stock is either being left vacant, being converted to residential uses, or being removed. Retail space, given the structural changes in the retail sector and the move to multi-channel (online / in store) shopping is also changing with less retail space being required, but that which is in demand being of larger floor areas enabling flexibility of use.

These changes and some of the recent trends which we will highlight in the next section have and are leaving their imprint on the city, towns and villages of the Island.

Stand out issues
Building quality and Vacancy

Building quality and maintenance issues are the first impressions from a tour of the Island. The older building stock needs improvement. Vacancy is giving way to neglect of some buildings to the point of dereliction as seen in Ramsey. "Missing teeth" was one description from a stakeholder in Ramsey in describing the visual presentation of the streets in the town.

Vacant development sites, or worse still stopped development sites, paint a gloomy picture and do not inspire confidence. Examples of these were seen in Ramsey and in the centre of Douglas.

Church Street in Port Erin is another example of vacancy and dilapidation, along with elements of Malew Street in Castletown. The main shopping area of Port St Mary is also 'tired' and in need of refurbishment.

1980s and 90s style office developments that may suit occupiers if offered at low rents, dominate the central business district. With quality occupiers, especially operating in the new economies that the government want to support, in the 'green', data and knowledge sectors, the Environmental, Social and Governance aspects of conducting business come into play. Therefore, more eco-friendly, quality, flexible workspaces need to be provided.

Transport

At rush hour times, the amount of car traffic on the road was noticeable. During the day, travel times between centres was between 20 and 30 minutes. However, it is noted that bus journey times can be up to an hour from centre to centre with less frequent services out of peak times. Parking and traffic issues were cited by local stakeholders from the recent surveys conducted, especially in Peel and from our observations, issues exist in Castletown along Castle Street.

The Retail, Leisure and Food and Beverage Offer

Developments in restaurant and bar provision in Castletown and North Quay in Douglas are examples of positive change, however, more needs to be done to create a convivial and therefore attractive environment for people to enjoy.

Younger people have already voiced their desire, through recent surveys, for covered leisure areas, including an improved cinema, food and entertainment offer. We advocate for the same to be established in Douglas to serve the entire Island. People still want to be with people and to socialise on the high street. Experience is the driver for attraction to the high street and that can be provided for through new central leisure developments that stitch into the retail fabric of the city centre, increasing footfall, dwell time and with it spend.

Culture, leisure, retail and hospitality along with good public realm and accessibility provide the conditions for vibrancy that enable more people being attracted to a place, staying and spending. Without this being addressed the other fashion brands that local people are seeking will be harder to attract to the Island.

Key Opportunities and Recommendations

Given the changes in retail, some of the vacant spaces in the towns and villages need repurposing working with the local residential and business community to devise plans to suit local need. There should be resources made available from central government to support a programme of building improvements, including where suitable, affordable housing and affordable workspace in the centre of the towns such as Douglas, Ramsey, Peel and Castletown, even if this required government acquisitions to enable progress to be made. Such actions could also lead to more sustainable businesses in the places outside of Douglas and mitigate for the tourism seasonality issues.

The local engagement and planning model used in Castletown, as described in the audit section, could be applied to all the towns and villages to establish quality improvements supporting the local economy, with development funding from central government. With the strong social capital that exists on the Island, open up the decision making to the community through meaningful engagement in order to reach a broader consensus for change.

Lessons could be learned from the UK Government's Future High Street, Town Deals and Levelling Up programmes with the best and/or adapted solutions being applied to the Isle of Man.

For Douglas, the key opportunity lies in revisiting the 2014 Master Plan. Some of the development sites identified then are still there to be developed, stuck for a variety of reasons. The original plan was retail and leisure led. Workspace and residential now need to be part of the mix with more work to be carried out on commercial workspace given the demand for quality space and the impact it has on city centre vibrancy[48]. Jointly working with property owners and investors with extensive public engagement, a refreshed plan supported by the community could be delivered, using public funding were required, but with community support to invest and deliver.

Sites such as the bus station site on Lord Street and the Villiers Square site, if progressed would make a big difference, show progress and inspire confidence.

Stakeholders interviewed have cited the requirement from local investors to require high levels of return from real estate investments and the lack of institutional investment from the UK or elsewhere. A lack of funding was also cited for tourism or leisure-based development. This is an opportunity for central government to bridge the gap, supporting viability gaps through grant funding such as:

- Open book development accounting with grant funding on completion – guaranteeing delivery for public investment.
- The use of Tax Incremental Financing to provide gap funding, using business rate uplift for a given number of years to support borrowing to be provided as grant funding either during or on completion.
- Government lease wraps on commercial development, reducing income risk, thereby lowering expected returns (yield) and improving capital value and therefore closing viability gaps.

[48] https://www.rics.org/news-insights/market-surveys/rics-commercial-real-estate-impact-report

Also cited by stakeholders were problems with the planning system, with delays in decisions and out of date policy. Improving the planning process has already been identified by the Business Isle of Man Programme 2023. We would go further in recommending a review of how best Planning, Infrastructure and Enterprise can work together better, either through a programme delivery environment or through organisational structure changes. The programme option would be preferred in order that progress on outcomes is made ahead of the usually very slow process of organisational change.

Housing affordability has been raised as an issue in the Housing Market Assessments and following strategy papers referenced in the audits above. Affordable housing provision should be seen as a key opportunity to retain and attract a younger demographic where the incentive of the current income tax policy is marginal for lower income levels. Even where the average salary may be higher on the Island, the cost of living and costs of getting on and off the Island are a disincentive. Affordable housing in strategic locations along with modern flexible workspace could help to repopulate and re-energise local centres.

Transportation opportunities need further consideration, however a review of bus timetables along with the introduction of express services may assist in transport modal shift from private cars to public transport, making the most of the investment made in the modern fleet.

b. Property, retail and place making trends.

In this section we will briefly set out some of the trends in property, retail and placemaking that are taking place in the UK and elsewhere.

The introduction of this particular section described the global changes that are impacting on the status quo. From a time when we were driven to our high streets out of necessity for acquiring goods and services and for socialising too, we can now buy and even socialise via digital platforms and services. Despite the digital trend, as humans we still seek human interaction. Where at one short point in time we thought that working from home might be all that we needed, the drawbacks were soon recognised in terms of the benefits that direct human interaction can have for development both in human terms and in the workplace.

Office

For office space, there is a drive for quality and eco-friendly / sustainable workspace. After securing HSBC as a pre-let in Sheffield's Heart of the City project, all other office space has been speculatively developed to high environmental standards. Most of that space, only just completed has now been taken up. The RICS produced a useful study in looking at the role of quality office space[49] and the evidence from Sheffield backs this up. Where secondary 1980s and 1990s office space have been converted to new environmental standards, for example in the town of Woking, take up has been good, despite increased rents compared to cheaper 'grade B' space available elsewhere in the town.

Leisure

According to Deloitte, Q1 2022 compared with the previous quarter showed that net spending was up in leisure categories save for a decline in betting, gaming and in-home activity. The largest growth areas were food and beverage and culture and entertainment[50].

We are seeing the need in the UK to develop a leisure offer alongside retail to provide that 'day-out' experience with the footfall supporting both leisure and retail. The current leisure facilities in Douglas are dislocated from the retail core. To attract new brands, the whole city offer must improve.

As an example, with the closure of major stores in Plymouth there was a need to fill the gap with a draw into the centre that would also support retail activity. Plymouth's Bretonside Bus Station underwent redevelopment to provide an indoor leisure offer with cinema, gaming (competitive socialising) and food and beverage[50]. This development has provided what was a missing piece of the 'jigsaw' to support town centre vibrancy and to act as a counterpoint to the decline in retail offers, while supporting the main shopping centre and stitching the leisure activity at the waterfront to the retail core in the centre.

[49] https://www.rics.org/news-insights/market-surveys/rics-commercial-real-estate-impact-report
[50] https://www2.deloitte.com/uk/en/pages/consumer-business/articles/deloitte-consumer-tracker-leisure.html
[51] https://www.drakecircus.com/barcode

Public Realm

Quality urban realm and more greenery / biodiversity is also a key trend. The public realm is undergoing largescale investment, mainly thorough the UK government funds that have been mentioned above. Design features include water play, new park areas and space for events and other gatherings. A public square is missing in Douglas and we heard from various stakeholders and from existing surveys that there is a need for a central focal point. Some of the current surface level car parks near the harbour and North Quay could be redeveloped as public space. This may appear controversial especially in terms of land value and other more economic uses such as office or residential development. However, it could be argued that any central public space could be put to better economic use but if that were so, many of the key landmarks in our towns and cities world-wide would be lost to development. A recent new public space has been created in Sheffield City Centre. Pounds Park, recently completed, the space was originally destined to be car parking and office development. Following the desire to improve well-being in the city, the Council decided to build a new park instead, creating a new focal point and a draw for all age groups, with play equipment for young children[52].

Retail

We will conclude with a short view on additional retail trends again looking at reporting from Deloitte[53]. Retailers will be taking advantage of digitisation and AI in satisfying consumer demand. Hybrid retailing will further develop between physical and digital experiences. Gaming will be tested as a channel for creating digital products. Given the e-gaming development on the Island, this could be an opportunity for new innovation. Through European directives and also consumer demand, more attention will be placed on ethics and sustainability. Again, for the Island, what role could innovation in sustainability linked to the Biosphere status provide the Island with new growth opportunities?

[52] https://www.bbc.co.uk/news/uk-england-south-yorkshire-65138973
[53] https://www2.deloitte.com/uk/en/pages/consumer-business/articles/retail-trends.html

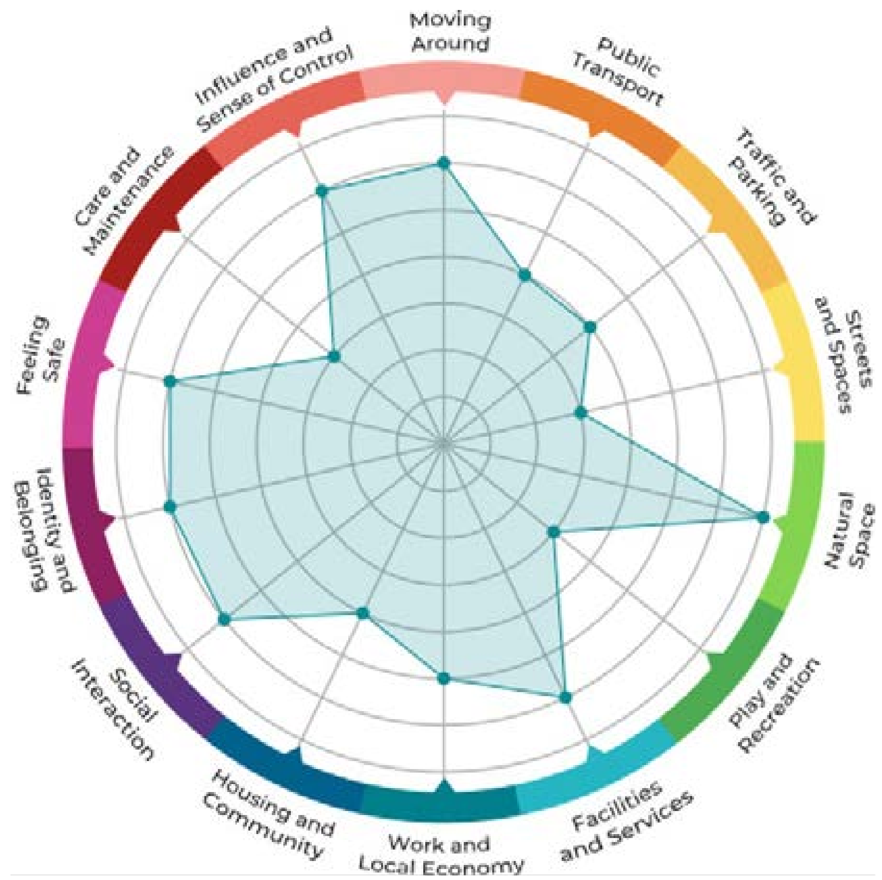


Figure 60 – Place Standard Model applied to all economic centres

c. Summary

Using the Scottish Government's Place Standard Tool, we have tried to summarise and highlight the key points for action.

Where a score of 6 has been given, it indicates that although there is always room for improvement, the aspect under consideration is not a key priority. Other lower scores indicate priority areas for action.

- **Public transport:** This is about a review of bus frequency and introduction of express services.
- **Traffic and parking** are about issues summarised from survey data and some local observation. Certain areas merit pedestrianisation while considering nearby parking and accessibility.
- **Streets and Spaces:** This is mainly about building condition and vacancy.
- **Play and Recreation:** This is mainly focused on Douglas and the need for improved culture, leisure and food offers that stitch together the retail landscape.
- **Work and Local Economy:** While vacancies are high and un-employment is low, the lower score for work and employment is to demonstrate the opportunity for creating quality workspaces across the economic centres, mitigating vacancy and seasonal issues.
- **Housing and Community:** The lower score on housing is to illustrate the need for looking at affordable housing as part of a package of things to incentivise a more sustainable population to stay on or migrate to the Island.
- **Care and Maintenance:** This aspect is to again illustrate the need to deal with building and public realm maintenance.

SUMMARY OF RECOMMENDATIONS

a. Maintain and develop research and funding into alternative drivers in the economy that employ people, retain the existing population and encourage inward migration of people and businesses.

b. Develop a programme of work that defines the actions necessary for Douglas, the towns and the villages, to achieve the vision and deliver on the priorities established in 'Our Island Plan 2023'.

c. Ensure that each town and village has a vision and plan that is aligned to the Island Plan so they create complimentary and not competing offers. Within each town audit we have identified what we feel this could be.

d. Create a stakeholder group that can create a plan as to how dilapidated buildings can be refurbished and repurposed including a review of the planning process to ensure planning decisions take place in the time required to execute the desired outcome. Utilise the Manx Development Corporation to de-risk challenging sites which will require public funding in order to create both economic and social value. Consider having an independent chair of such a body who is not from the Island.

e. Focus on improving Douglas as the Island's capital city. Revisit the city masterplan in order to create the public space that will deliver the heart to Douglas along with the required workspace, housing, retail and leisure uses to meet the needs of young and old residents, visitors and workers.

f. Seek to 'curate' the right offer to meet residents' needs by developing schemes along the lines of the case studies shared to position high streets as a testbed for new ideas.

g. Create a strong business start-up offer through grants, mentoring and business space to encourage and support entrepreneurship and encourage people to set up business on the Island. This should include a programme of work to identify the strong independent businesses that already operate on the Island and support sustainable scaling up of those businesses that could operate Island wide. For example, consider a Bakery outlet in all of the economic centres of the Island instead of a Greggs or other chain retailer.

h. Create a plan to encourage out of season visitors through offers on transportation and hotels that can be linked to the broad cultural and natural offer that the Island has along with an out of season events programme.

i. Look at ways of fostering social capital between the towns, villages and Douglas through encouraging the level and style of leadership that is happening in Castletown along with engagement with communities and stakeholders whose views are acted upon.

j. By the very nature of the Island's geography and transport infrastructure, a scheme to facilitate cars has to be at the forefront of any plans especially with the desire not to allow any out-of-town retail parks. Sustainable travel should be encouraged over time but in the short term the car is still the primary transport method for the majority of the people.

k. Activate vacant space through 'carrot and stick' initiatives, having understood the reason for vacancy and what is required for bringing property back into use. Where vacant property is not being marketed and the landlord is disengaged then the local authority should look at ways to tax the landlord or offer the property to others who can evidence a viable use.

l. Create wider awareness of the Island and its offer to the wider UK through marketing and road shows including the incentives to live, work, set up a business and visit all year round. Facilitate more articles such as this one that appeared in the Daily Mail https://www.dailymail.co.uk/travel/article-12154995/The-joys-Isle-Man-little-British-secret-Island.html and look at advertising options in high population and high cost of living places like London and the South East. Marketing and roadshows could include retail-based events in the UK such as Completely Retail (www.crmarketplace.com) where alongside landlords, the public sector also take stands to promote their locale to target retail brands.

CONCLUSION

Our engagement with key decision makers and businesses, residents and visitors highlighted several strengths and weaknesses.

On the latter point, there are clearly gaps in service provision across the Island in leisure, start-up support and a range of retail to meet everyone's needs. These challenges have been further compounded by weak footfall, no clear retail strategy and a shortage of 'place visions' or long-term plans.

Two years ago, MPs from the Levelling Up, Housing and Communities Committee in England published a report urging the Government to publish an annual list of which areas had strategies for their high streets and when they were last updated.

While this advice has fallen on deaf ears where English ministers were concerned, more and more UK towns are now working on plans and visions – and this is something we would recommend Manx decision makers to embrace.

Since Covid-19, the pace of change has picked up where high street evolution is concerned. High streets are no longer synonymous with just retail and drivers in leisure, food and drink, health, culture and experiential diversity are transforming the landscape.

On the face of it, there is evidence to suggest that the Isle of Man is behind the curve where these changes are concerned. But there are also signs that indicate the Island is well positioned to meet the changing needs of modern consumers.

Certainly, from an events perspective, the Isle of Man seems to have a strong understanding of the modern experience economy. It already hosts large numbers of successful events and there are opportunities to not only increase these events, but also host more bespoke food and drink experiences. The example of Foodie Friday that is included in our case studies is a valuable pointer of what small scale investment can do to generate footfall, create a buzz and attract investment in struggling areas.

But while investment in high streets is essential to increase their vibrancy, this must be matched by strong leadership and we were especially encouraged by some of the examples we saw of this on the Isle of Man.

In Port Erin, for example, we were told the Council prioritised getting "the right kind of people with dynamism and a positive attitude as opposed to someone who is going to pay the most rent." And in Castletown we heard a clear vision being articulated to make the town the "foodie capital" of the Island.

This leadership should be supported – and funded – but it is also important to manage expectations of what can be achieved. Given the population of the Island, it is not possible to provide a Metropolitan retail choice, as surveys clearly indicate there is a desire for.

To improve retail choice and also support a more diverse food and drink offer, it is necessary to work more closely with landlords, consider further legislation changes along the lines of the rental auctions case study highlighted here and pursue a curation strategy to incentivise new businesses to take up empty units.

The case studies listed, pioneered by Westminster Council, Oxfordshire LEP and Aberdeen and Grampian Chamber of Commerce, show what can be with relatively small amounts of funding.

These schemes are not only helping some of the best online businesses move into bricks and mortar businesses, but also helping high streets to become exciting testbeds of innovation.

They are the kind of schemes that we would encourage the government to look more closely at to help tackle empty shops and kickstart a high street revival in areas that need attention.

As a destination with an ambitious tourist strategy, such measures could be the catalyst to unleash the animal spirits of a new wave of high street entrepreneurs to drive vital improvements across the Island.

Figure 61 and 62. Foodie Friday in Stockport

CASE STUDIES LINKED TO RECOMMENDATIONS.

a. High Street Rental Auctions
New powers for local authorities in England are being introduced under the Levelling Up and Regeneration Act. They are currently not yet in force, requiring secondary legislation (expected to happen this Spring) to implement the detail, but High Street Rental Auctions will enable local authorities to facilitate the lettings of vacant high street properties.

Under the Act, local authorities will be able to put high street properties that have been empty for more than a year into mandatory rental auctions. The local authority would subsequently enter into a "tenancy contract" with the successful bidder and the proposed lease must have a term of at least one year but no more than five years. There is no minimum level of rent that must be paid and an agreement of as little as £1 a year could be struck.

The Government are set to shortly publish the results of a consultation before this is carried forward to secondary legislation, but the powers are expected to be used only where vacancy rates are a significant issue and landlord co-operation is low.

There is currently considerable anticipation around these powers and, if passed, are expected to become a vital tool to tackle empty shops and help restore high streets to become vibrant places again.

b. Foodie Friday
Foodie Friday is a popular street food event that takes place in Stockport, South Manchester, on the last Friday of every month. It recently won the 2023 Manchester Food and Drink Festival 'foodie neighbourhood of the year' award, and its impact on the regeneration of Stockport has been considerable.

It was launched by the Council in 2013 at a time when the town was struggling with a negative image and empty shops. At first it was poorly attended, but in 2015 it received £10,000 of funding from the Portas Pilot fund and a new partnership model of management was established with private operators leading on the delivery. It subsequently put a marketing strategy in place and introduced live entertainment and better quality artisan food traders. Suddenly thousands of people began attending and a year later it won the 'Best Event' award at the 2016 Manchester Food and Drink Festival.

From there, it has gone from strength to strength and attracted visitors from across the region. In 2018, The Blossoms, a popular indie band whose 2016 self-titled album topped the chart for two consecutive weeks, launched their new album from an ice cream van at Foodie Friday. Growing attendances and the buzz around the event has greatly contributed to inward investment and a host of independent bars and restaurants opening in the area.

c. Lessons from Belgium - Roeselare
A number of local government delegations from England have visited the city of Roselare in West Flanders to see the impact the Belgian mayor Kris Declerq is having. It

Figure 63 – Homes above shops in Roeselare

Figure 64. Meanwhile in Oxfordshire

is a small municipality with a population of less than 50,000. But Declerq has introduced bold measures to revive their high streets by turning churches into artisan food markets, converting car parks into green spaces and attempting to "go back to the Agora" by seeking to recreate the famed public space in ancient Greek cities.

Declerq has overseen a resurgence in independents and housing above shops through his policies. He has powers to fine landlords who keep their shops empty for over a year and has seen rents dramatically fall (making it easier for independents) after issuing fines.

He also overseen a big increase in the numbers living in the city centre above shops, and he has created innovative partnerships between developers and retailers, with a €15,000 subsidy for those prepared to live above a shop.

Declerq's ideas draw heavily from the high street reviews, Grimsey Reviews, which were published between 2013 and 2018.

d. 'Meanwhile on: Oxford Street' and 'Union Street', Aberdeen
A number of initiatives to 'curate' better high streets are currently being employed by English local authorities with the most notable being Westminster Council's 'Meanwhile On' scheme. Following a backlash against the proliferation of garish sweet stores, this scheme is seeking to revitalise Europe's busiest shopping street by inviting innovative, cutting edge and up and coming businesses to apply.

Up to 35 brands will be given a prime location for an initial six-month period, 100 per cent rent free. There will be a variety of store sizes on offer, single tenancy and curated stores shared between like-minded concepts.

To help these businesses get off to the best possible start, the scheme also offers a package of support including store design, mentoring and management from independent retail consultants.

A similar scheme is also being piloted by a campaign group in Aberdeen called Our Union Street. This has come about from the visible decline of a once great shopping area and local people's frustrations at empty uninviting shops, graffiti, litter and weeds growing on balconies.

Founded by Aberdeen and Grampian Chamber of Commerce and fronted by business leader Bob Keiller, this initiative is looking to reinvigorate Aberdeen's Granite Mile by offering occupiers up to two years rent and rate free in 43 empty units.

It is looking to attract and incubate a vibrant new set of businesses to bring footfall, excitement and sparkle back to this major shopping thoroughfare.

Funding has come from two streams – 80 per cent is provided by the private sector and the rest is coming from Aberdeen City Council.

e. Meanwhile in Oxfordshire
Another scheme that seeks to incentivise successful online businesses and entrepreneurs to dip their

toes into bricks and mortar retail is the 'Meanwhile in Oxfordshire' scheme, which was funded by a £1.8million grant from Oxfordshire Local Enterprise Partnership (OxLEP).

It was designed by Oxford City Council, carried out by Makespace Oxford and supported by all of Oxfordshire's Councils.

In its first phase it fitted out 27 vacant units across Oxfordshire, which accommodated more than 50 organisations and provided at least 150 jobs.

Next Generation London
This was a youth entrepreneurship support programme in London delivered by Enterprise Nation and the Launch It Trust in 2022.

The 'Next Generation' support programme was devised to provide on-demand and tailored support to underrepresented young people (aged 18-24 years) across London, who found themselves socially and/ or economically disadvantaged or adversely affected by the pandemic, to help them to successfully start or grow their own business.

An online support hub was hosted on the Enterprise Nation platform, providing on-demand support (e.g. E-learning modules, webinars, workshops, articles, peer-networking) providing inspiration, and educational content for 3,000+ aspiring young founders from across the capital.

In working with all 32 London Boroughs, sub-regional partners, and the GLA centrally, a comprehensive marketing and outreach campaign was delivered, including engaging with workspaces, FE/ HE institutions, community organisations, local job centres, business networks, and housing associations to engage young people 'where they are'. This included innovative outreach approaches via social media, through the use of nano-influencers, targeting young people as ambassadors within their personal and community networks to help spread the message and increase the programme's reach among the target audience. Enterprise Nation worked with each organisation to accept referrals into the programme, as well as to signpost young founders into existing supports (including non-entrepreneurial) available via public and private sector organisations across London.

Having first built a community of like-minded young founders, Enterprise Nation and Launch It then delivered an intensive 12-week bootcamp for 100 high-potential young founders with business aspirations to successfully launch a new business and/or product. Weekly training sessions were complimented by peer-mentoring, 1-2-1 advice sessions, pitch coaching, and cash grants. Bootcamp 'graduates' were then invited to attend a 7-day pop-up shop on Oxford Street, whereby they could trial in-person sales, on the UK's busiest high street.

Data and insight was gathered throughout by Enterprise Nation, aligned to GLA performance and expenditure reporting requirements, which showed 84% participants had launched a new business/ product as a result of

Figure 65 – The Barcode – Plymouth (Image www.visitplymouth.co.uk)

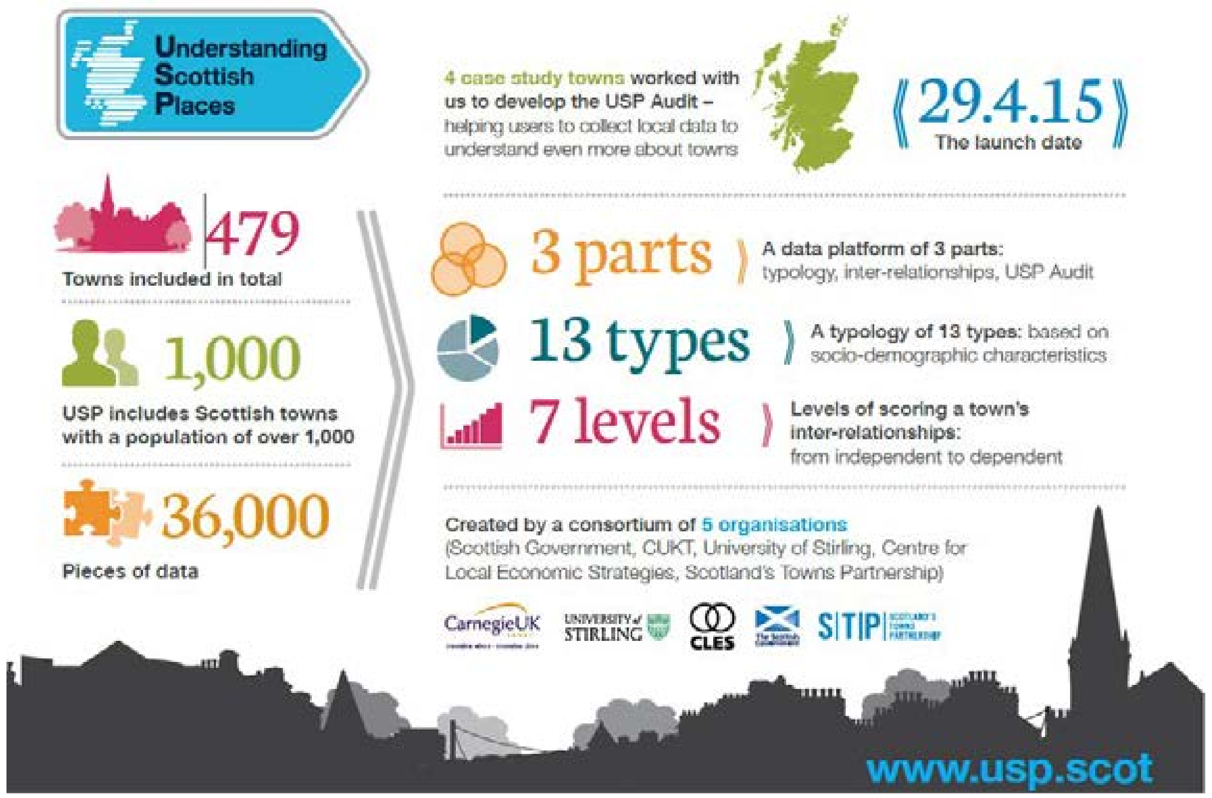
support, while 40% had since hired a freelancer into their business. Enterprise Nation's in-house Programmes, Community, Marketing, and Finance teams collaborated directly with GLA colleagues, to ensure all programme reporting obligations were met.

Next Generation case studies include:

- Caitlin La – Boat People Sauce
- Jordan Hall - FORE
- Three inspirational young founders

g. Plymouth
At the height of retail development in the late 1990s and early 2000s, Plymouth City Council through a development agreement saw the building of Drake Circus Shipping Centre. Adjacent to the new mall was Bretonside Bus Station. In earlier years a leisure complex had been developed away from the centre with poor direct connectivity and nothing to link time spent there with time spent in the city centre. At one point more retail was planned for the bus station site with plans muted for an Ikea store. However, those plans never materialised. When British Land acquired the Drake Circus Shopping Centre, they could see how the failure of other retail offers in the city were detracting from visits to the shopping centre. A deal was done with the Council to redevelop the bus station to develop a new leisure centre with cinema, competitive socialising and food, named the Barcode (https://www.drakecircus.com/barcode). Although it could be argued that some of the occupiers could have been found space in the empty units elsewhere in the city centre, the critical mass created in one place in close proximity to the shopping mall has created a new focus in the city centre attracting people in who can also then shop in the city while giving operators the comfort of trade from a focused and not disparate footfall.

APPENDIX A – USP METHODOLOGY



Methodology

Developing Understanding Scottish Places involved the following steps:
Geography: defining the geography of towns to be included in USP
Socio-demographic typology: setting the context of each town
Size classification: grouping towns by resident settlement size
Inter-relationship model: this explores how towns inter-relate and to what extent they are independent, interdependent or dependent

Geography

Understanding Scottish Places uses national recognised boundary definitions at the locality level. This permits the use of a wide range of national government data, as smaller geographies (such as output areas) can readily be assembled into localities. Localities were preferred to the geography settlement as the criterion for defining a settlement was more demanding and would have excluded places on the edge of conurbations which have their own town identities.

'Localities correspond to the more recognisable towns and cities of Scotland which can be found within settlements. They also have a minimum rounded population of 500 people or more' (1).

Localities are taken to be the nearest administrative definition of towns available. On the USP web interface the term 'towns' is used rather than 'locality'.

USP is about towns, and not about local authorities or other geographies, and that consistency and comparability across Scotland are key principles of the project. Only datasets which include all Scottish localities ae included.

Socio-Demographic Typology

The 2011 Scottish Census provides data on a range of demographic, social and economic indicators. Data for a series of variables were downloaded for each of the 479 localities and are used to derive a typology of Scottish towns. The variables were selected with the statistical clustering procedure K-Means in mind. Some pre-analysis of variables was carried out to understand the dimensions of the data and to ensure that the variables would offer sufficient breadth and variety to be meaningful. Only 1 composite variable (Deprivation) was included.

Grouping Towns into Clusters

K-Means clustering is a data driven clustering procedure which seeks to maximise differences between clusters, with cases being as similar as possible to others in any cluster and as dis-similar to cases in other clusters as possible. Unlike other procedures it does not start from a theoretical basis and established groupings to which cases are added, nor does it merely divide the range of values for cases into classes. K-means clustering is based upon numerical distance between cases when represented by scores on the variables. The number of clusters dictates the number of centroids and the distances are measured from these. The cases are grouped by minimising the distances between cases. The process is iterative and stops when no cases can be moved between groups.

The clustering procedure involved repeating the process for different numbers of potential clusters. A judgement was made between too much detail (too many groups of 1 locality) and too much generality. Five cluster groups were selected with only one of these having only 1 representative locality.

F values are calculated which are indicative of the contribution of each variable to the final analysis. Final centre clusters are used to define the clusters. Not all cases in a cluster share all characteristics of the cluster to the same degree. They are generally more like each other, however, than the cases in other clusters. No time series data is included in this version of USP, so it is unable at this point to differentiate towns on different trajectories.

Locality size

It is logical to expect that locality size, in terms of resident population, will impact on a locality's function and service provision. The clusters therefore have to be disaggregated in terms of the size of the towns. The table shows the size categories used, which provide compatibility with the Scottish Government's Urban-rural classification size bands.

Inter-Relationship Model

The next level of Understanding Scottish Places was to apply an inter-relationship model. The inter-relationship model is framed by the Centre for Local Economic Strategies (CLES) research over the last ten years about the resilience of place. (The CLES resilience model explores the assets and relationships which places have between the public, commercial, and social sectors and how that shapes the functioning of their economies. The inter-relationship model explores this further by identifying the extent to which places are reliant or otherwise upon neighbouring localities for these assets and relationships.

In the Understanding Scottish Places (USP) project, we have developed a way of exploring this through developing a set of indicators. These indicators enable us to define the relative independence, interdependence, and dependence of the 479 towns in Scotland with a population of over 1000 people. We have called this our inter-relationship model.

An independent town will have a high number of public; commercial; and social economy assets in relation to its population. This will include GP surgeries and charities. It will have a diverse sector base in terms of jobs. Residents will travel short distances to work and study and the town will attract people from neighbouring towns to access its assets.

A dependent town will have a low number of public; commercial; and social economy assets in relation to its population. It will be reliant on singular sectors in terms of jobs. Residents will travel longer distances to work and study and the town will be reliant on neighbouring towns for assets and jobs.

An interdependent town will sit somewhere between independent and dependent towns. For some public, commercial and social economy assets it may have a high number in relation to its population and for others a low number. A balance of people will work and study in the town with others reliant on neighbouring towns.

Approach

Twelve indicators are used which explore the inter-relationships within and between towns in Scotland. These indicators were chosen on the basis of data being nationally available to populate them. The indicators portray three things:

There are indicators which detail the number of certain assets in the town when compared to its resident or working age population;
There are indicators which detail the diversity of the business and employment base in the town;
There are indicators which detail the distance people resident in the town travel to work and to study.

For each indicator, towns have then been split into sevenths depending on their position across the 479 towns and given an appropriate score. Towns in the top seventh on each indicator (a high number of shops per resident, for example) have scored 6 and towns in the bottom seventh (a low number of shops per resident, for example) have scored -6 with increments of 4, 2, 0, -2, and -4 in between.

Once we have analysed each indicator for each town we have then added up the individual scores to derive a total for the town. The highest aggregated total score is 52 with the lowest -58. We have then taken the difference (110) between highest and lowest and split the towns into seven equal increments. For example, towns scoring between 36 and 52 are in the top increment. They have been subsequently been provided with the following assessments.

First increment - Independent
Second increment - Independent to Interdependent
Third increment - Interdependent to Independent
Fourth increment - Interdependent
Fifth increment - Interdependent to Dependent
Sixth increment - Dependent to Interdependent
Seventh increment - Dependent

This gives each town their overarching score and assessment using our inter-relationship model.

Independent towns have a high number of assets in relation to their population; a strong diversity of jobs; and residents travel shorter distances to travel to work and study. These towns will attract people from neighbouring towns to access their assets and jobs.

Independent to Interdependent towns have a good number of assets in relation to their population. These towns have a good diversity of jobs; and residents on the whole travel shorter distances to travel to work and study. These towns attract people from neighbouring towns to access some of their assets and jobs.

Interdependent to Independent towns have a good number of assets in relation to their population. They have some diversity of jobs; and residents largely travel shorter distances to work and study, although some travel longer distances. These towns attract people from neighbouring towns to access some of their assets and jobs.

Interdependent towns have a medium number of assets in relation to their population; average diversity of jobs; and residents travel a mix of short and long distances to travel to work and study. These towns are attractors of people from neighbouring towns who come to access some assets and jobs but they are also reliant on neighbouring towns for other assets and jobs.

Interdependent to Dependent towns have a low number of assets in relation to their population. They have some diversity of jobs; and residents travel largely longer distances to work and study, although some travel shorter distances. They are reliant on neighbouring towns for some assets and jobs.

Dependent to Interdependent towns have a low number of assets in relation to their population. They have a poor diversity of jobs; and residents on the whole travel longer distances to work and study. They are reliant on neighbouring towns for some assets and jobs.

Dependent towns have a low number of assets in relation to their population; a reliance on one sector for jobs; and residents travel longer distances to work and study. They are reliant on neighbouring towns for assets and jobs.

Didobi

This report was researched and written by

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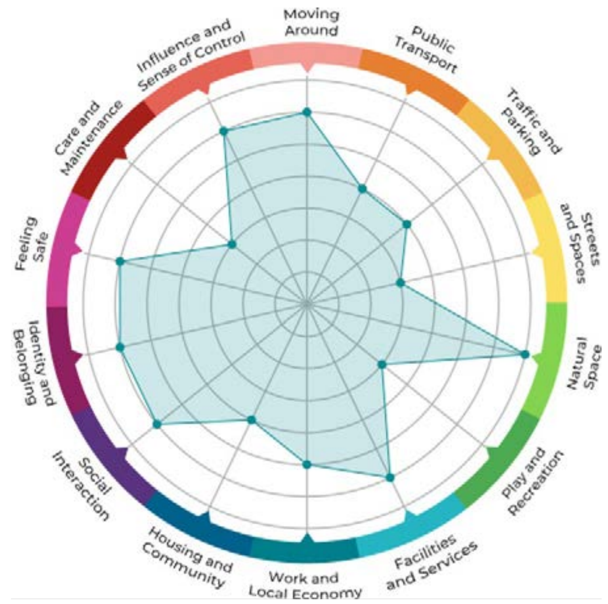
ISLE OF MAN



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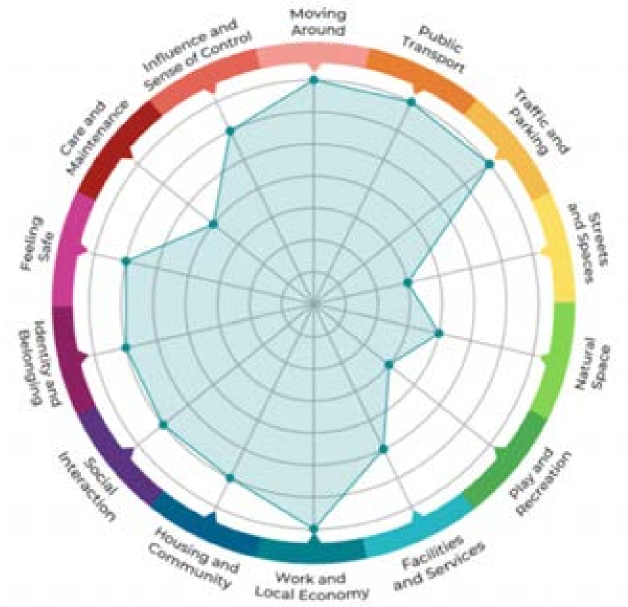

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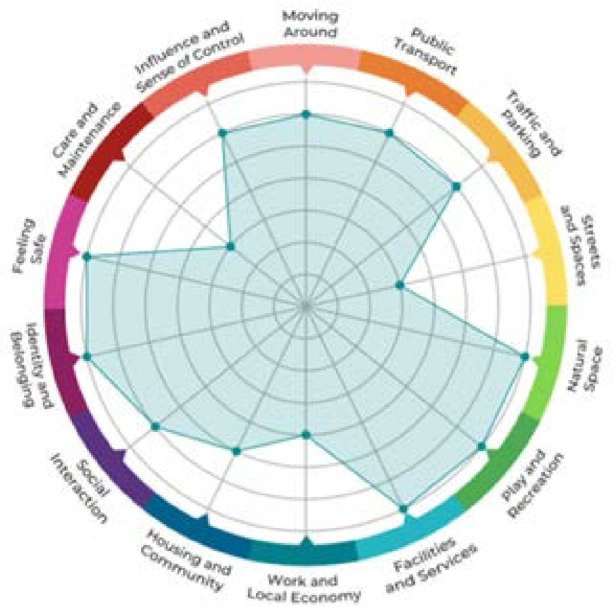

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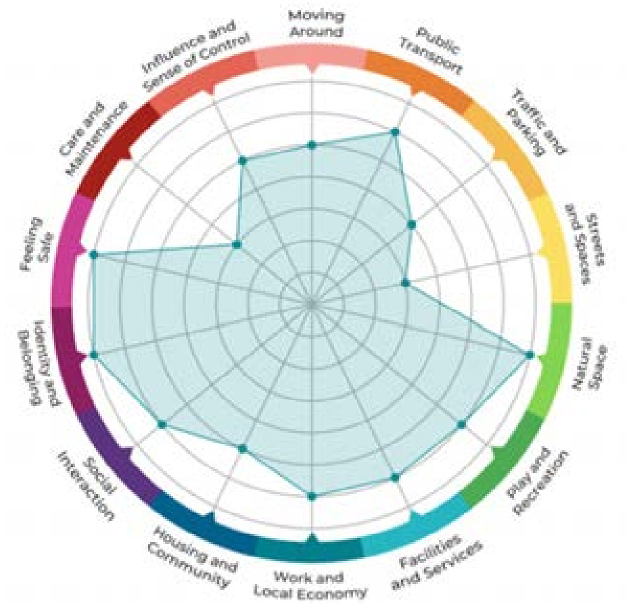

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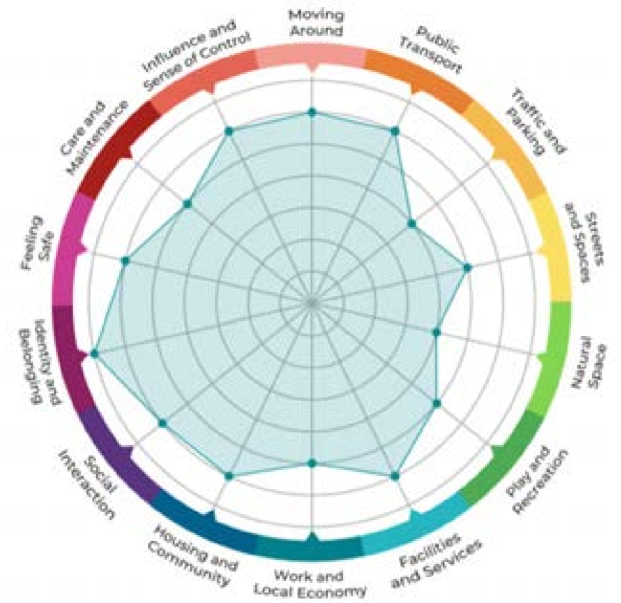

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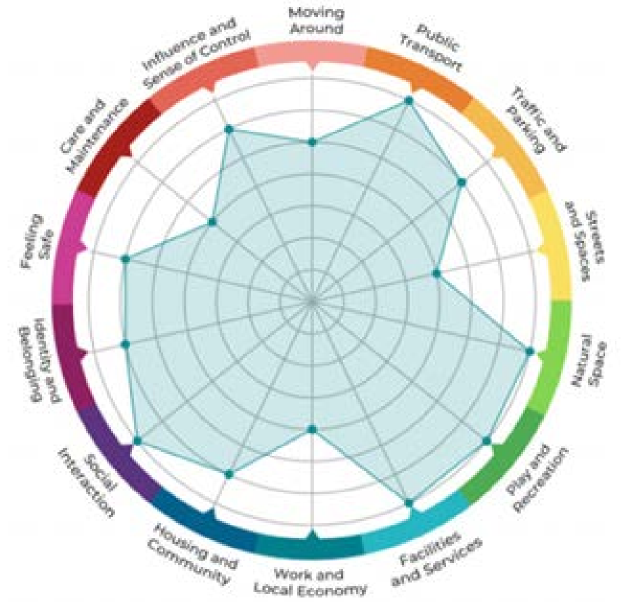

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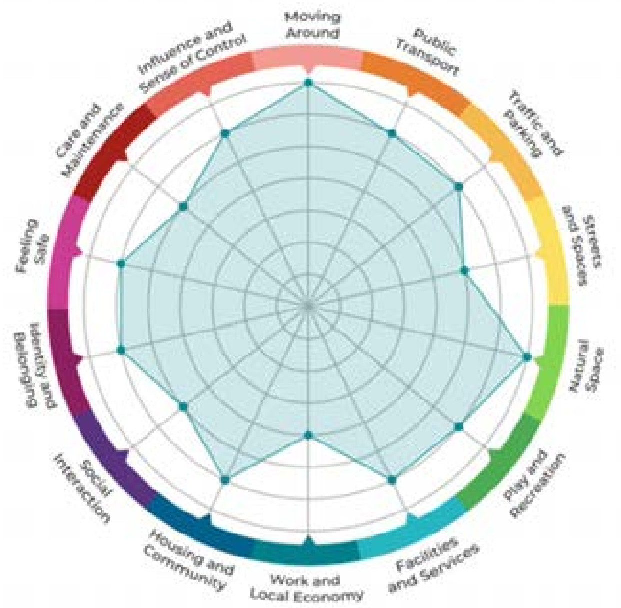

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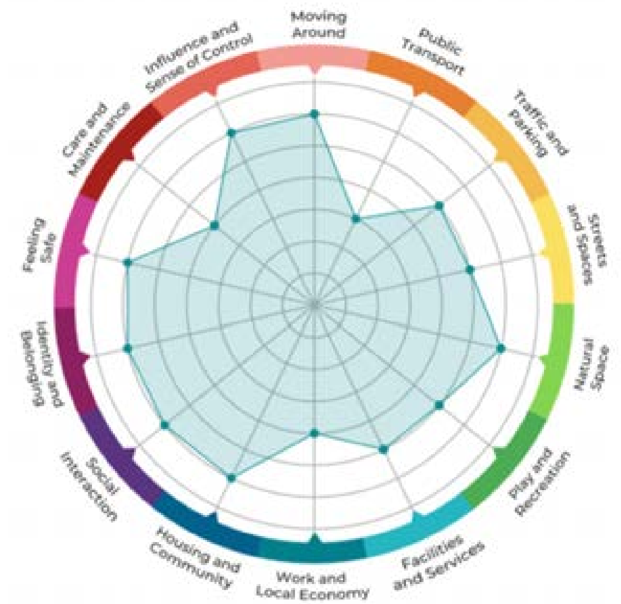

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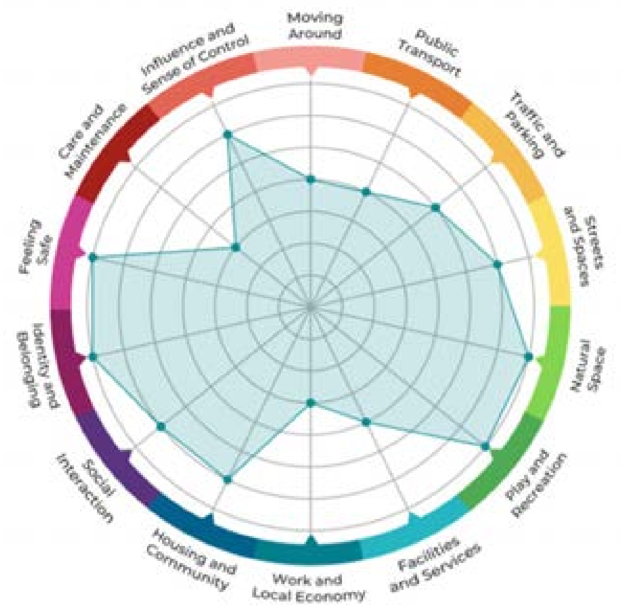

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