HAYLING ISLAND SEAFRONT REGENERATION ANALYSIS AND FEASIBILITY STUDY JANUARY 2019

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1. EXECUTIVE SUMMARY

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1.1 Hayling Island seafront offers a rich water sport heritage and high-quality natural environment around which to deliver an achievable vision for regeneration, offering a positive future for leisure and tourism. This feasibility study sets out a clear vision and strategy to achieve this by enhancing the range and quality of attractions, improving the environmental quality and urban design of the seafront and connecting key" honeypot" sites in ways that reflect the heritage of the island.

1.2 The local tourism sector remains vibrant, attracting over £190m in visitor spend and sporting 4,440 local jobs[1]. But much of the seafront infrastructure on Hayling Island is now dated, suffering from long term lack of investment and a lack of high-quality leisure attractions that appeal to modern visitors. National brands control the bulk of the accommodation provision on the island in the form of self-contained holiday parks. As they strive to improve quality and drive up value there is a danger that the seafront will be left further behind, abandoned by tourists and residents losing out on access to high quality leisure infrastructure funded via tourism.

1.3 Meanwhile, coastal erosion and rising sea levels requires a flexible approach to regeneration with the need for long term re-location of some leisure facilities such as the Hayling Billy trail and some beach huts. Limited access onto the island and concerns around traffic volume go hand in hand with a need to identify a sustainable way to regenerate the seafront. The key challenge is to create a compelling modern offer that will appeal to new, higher spending visitors who will be encouraged to stay longer rather than attempting to increase the overall volume of existing lower spend visitors. This can be achieved by focusing on growing niche markets such as water sports and activity holidays.

1.4 Improving access to the beach and connections across the seafront via cycle and walking routes facilitated by better wayfinding signage as well as better access to water sport activities will be crucial in helping an increasingly ageing local population stay fit and active. Keeping people healthier and fitter for longer will help to reduce the pace of demand on social and health care budgets for the Local Authority and Health Services.

1.5 Hayling Island is facing a serious population time bomb imbalance. 29.6% of the population are aged over 65[2]. This compares to 20% average for the other 274 coastal settlements in England and Wales and 16% for the country as a whole. It is critical that a new generation of younger families settle on the island and find good quality local jobs.

1.6 This report proposes development of good quality homes on the seafront of appropriate size and scale that inject "beauty" into the existing housing offer. These homes will be designed for families and in turn will help to fund the improvement of leisure facilities in honeypot sites along the seafront. Meanwhile, it is equally important to retain and support open areas of wilderness, intrinsic to the character and appeal of the seafront. The proposals in this report aim to strike an appropriate and sustainable balance.

1.7 The leisure and residential proposals in this report have been developed in response to a wide-ranging online survey that captured the views of over 800 residents, workers and visitors to Hayling Island during August and September 2018. This was further developed in a workshop with key stakeholders and helped to reinforce how important Hayling Island seafront's natural environment and its popularity for water-based activities as well as walking, running and cycling activities.

[1] *The Economic Impact of Tourism, Havant in 2016. Tourism South East, 2017*

[2] *ONS (Office for National Statistics) Website*

1. EXECUTIVE SUMMARY

1.8 One resident survey comment sums up the potential: "This is an opportunity to transform this beautiful place into something wonderful, making the most of the seafront with eateries, cafes, nice playgrounds and activities to keep our children safe and entertained outdoors. Make Hayling a place to be more- proud of."

1.9 The vision takes a zonal approach to key honeypot sites on the seafront. At West Beach the vision is to create:

•Activity and experience- based place which takes full advantage of the unspoilt natural qualities of this end of the island. Aim to enhance the already rich and wild landscape with an emphasis on a natural planting scheme. Preserving and enhancing the open sea views, the character of this part of the beach will be all about the encounter with nature on both sea and land.

•A multi-generational, accessible place where people can come together to socialise and become immersed in a natural beach front environment.

•A hub for health and well-being to experience the landscape through activity: walking, cycling, running, water-sports.

•Clear communication of what is on offer which still allows some parts of the Island to feel undiscovered.

•Green links to support the growth & performance of the experience economy and activities available on the beach front sites and around the wider Hayling Island area.

Beachlands will feature:
•Small scale and family-friendly, overnight or short-stay opportunities that overlook the beach front.

•Beautifully designed apartments and housing
•Sea view cafes / restaurants with an independent focus.

•Landscaping that is an inviting connection to the beach and a destination in its own right.

1.10 Eastoke comprises:
•Leisure focused site with a mixture of paid for and free small-scale recreation facilities that are attractive to residents and visitors to Hayling Island.

•Encourage activity at this part of the water front all year round and evening through a relaxed modern beach restaurant that spills onto the sand.

•Good connections to accommodation and housing offers to the West of the beach front.

•A variety of good quality kiosks that offer good quality, exciting, modern food and drink options, rental opportunities.

•Prudent Co-location of leisure and retail to aid and create footfall for the existing retail and cafe's / restaurants at Eastoke

1.11 Threading and connecting these sites will be an active landscape designed to encourage walking, running and cycling through more clear, accessible and attractive routes. It will feature street furniture that is thought through, goes together and helps to create a strong sense of place.

1.12 Southwood Road / Creek Road area features
At Southwood Road the focus is purely on an appropriately scaled residential development of good-quality family homes and apartments.

1.12 We have taken a prudent sensitivity analysis to establish the residential portions of the development could deliver a residual land value between £7.3 and £8.975m which, via a phased approach to regeneration could deliver the leisure improvements.

1.13 A series of quick and simple wins built around a Council-led commercial investment in overnight stay beach lodge accommodation at West Beach and other public access improvements would take place along with community engagement to ensure local support. Medium term, phasing development sites starting with Southwood Road followed by recommendations for the Council to work with the owners of Funland to secure appropriate development. A final phase would see regeneration at Eastoke.

2. BACKGROUND, CONTEXT AND OBJECTIVES

2. BACKGROUND, CONTEXT AND OBJECTIVES

2.1 The Hemingway Design led multi-disciplinary team were appointed in July 2018 by Havant Borough Council to undertake a feasibility study into Hayling Island seafront and develop a vision for regeneration. This study has been framed around responses to the regulation 18 consultation on the draft proposals for Hayling Seafront and will be used to inform the Council's new Local Plan 2036.

2.2 The initial focus for the study are the four key sites at Southwood Road, Eastoke, Beachlands and West Beach. This report identifies how regeneration can re-enliven Hayling Island's leisure and tourism appeal around a distinct brand.

2.3 The study has been framed with reference to Policy KS4 of the draft Local Plan 2036 and considers a sensitive and high-quality mixed use enabling development of new homes to fund sustainable leisure and tourism improvements to the seafront.

2.4 The Council identifies a number of key objectives for improvements to the seafront:

- Deliver a positive contribution to the visitor economy of Hayling Island generally and the seafront specifically
- Development that transforms the seafront, maximising the use of the sea, enhancing the quality and range of attractions, the public realm and the natural environment
- Improvement to the environmental quality and urban design of the four sites at Southwood Road, Eastoke, Beachlands and West Beach
- Create a logical series of routes along the seafront which are accessible to all
- Reflect the heritage of Hayling Island within public space improvements, eg: public art.

3. LOOKING TO THE FUTURE: COASTAL TOURISM TRENDS THROUGH TO THE 2030S

3. LOOKING TO THE FUTURE

3.1 National trends

3.1.1 VisitEngland identifies significant potential for future tourism growth across the UK over the next 10 years. We will see a rise of international numbers of tourists coming to the UK. This is fuelled by a longer-term trend seeing a rise in global affluence. Middle classes continue to grow with the IMF predicting these will peak globally at 4.9 billion by 2030, up from 1.8 billion in 2009. Much of this growth is anticipated to come from Asia.

3.1.2 Globalisation, international media and brands and increasing consumer choice is leading to increasing national protectionism by Governments with western countries feeling a crisis of identity. This is being played out within the tourism industry by countries and destinations focusing on identifying distinctive qualities and experiences to stand out in the market place. Increasing connectivity is driving international tourism to the UK and Hampshire with its ports and airport is well placed to take advantage of this.

3.1.3 However, international visitors to Hayling Island will be restricted due to a lack of awareness and brand, current limited tourism offer, a lack of knowledge of UK geography and transport networks combined with reservations about driving on the 'wrong side' of the road.

3.1.4 **Ageless Travellers:** by 2024 the number of people aged 60 and older will outnumber children younger than 5 according to the World Health Organisation. The UK predicts that by 2040 Europe will become the first continent where the proportion of population under 24 will be smaller than those over 65. With people increasingly delaying major milestones such as marriage and children till later in life coupled with people living longer and more active lives it is becoming increasingly less relevant to think about travellers in terms of their age and more in terms of their interests.

3.1.5 **Travelling solo:** Traditionally, solo living and travelling was synonymous with young adulthood and later life. Increasingly, though, life stages are becoming more flexible and even repeated. People are experiencing living on their own across any number of points in their lives, which brings related consequences of single living into types of leisure activity enjoyed. In the UK, 26% of households are single. Solo travelling is one of the fastest growing categories and many travel brands are tapping into this niche. Solo adventures are positioned as enriching opportunities for self-discovery.

3.1.6 **Inspiration and pre-planning:** The online world offers an endless inspiration and ideas for travel however, future travellers tend to only receive a much narrower range of options 'curated' by algorithms and social networks creating a filter bubble that tourism destinations and products have to work harder to penetrate. People trust their friends' recommendations over travel agents or travel packages. For tourism products to beat this filter bubble they need to ensure they are part of consumer conversations, endorsed by social influencers and hopefully tick the boxes of key criteria to feature in algorithm results. Instead of trying to be all things to all visitors. Tourism products need to be clear on which target groups/ niches they want to address.

3.1.7 **Value for future travellers will be about more than price.** They will opt for trips that allow them to collect as many unique experiences as possible for the minimum investment of time and money to get there.
With limited budget and holiday time available, future travellers want to find out as much as possible about their destination before getting there. They expect destinations to empower them by providing enough information up front about tourism products.

3.1.8 **Popular bloggers, vloggers and other social influencers** are becoming powerful sources of inspiration for holidays.[1]

[1] *The Future Travel Journey: Trends for Tourism Product Development. Visit England, 2017*

3. LOOKING TO THE FUTURE

3.1.9 **Travellers want to customise and negotiate their travel experience.** Example: GO City Card offered in a number of US cities. Users opt for all-inclusive access pass or build their own around specific attractions or a top 5 attractions pass. Beyond reducing cost, the visitor can go straight to the gate and avoid queuing.

3.1.10 **Death of Risk.** Itineraries and organised tours are popular with visitors fearing that they might miss out on what a destination has to offer, as they have limited time and budget. These can be self-guided online downloads or bookable online tours. They may also use 360-degree VR views to give travellers and clearer idea of what to expect. In particular, for parts of England that are less known by the masses, this can be a powerful tool to persuade travellers of the charm of these destinations.

3.1.11 **Wishlisting**. Future visitors are collating wishlists on Pinterest, Instagram and other online platforms.

3.1.12 **Imagery shared by peers and social influencers.** With some much of our identities and relationships played out online, these moodboards are an important channel for people to showcase their tastes and personalities. Placemaking, event spaces and wayfinding architecture can all play a role on Hayling seafront to provide iconic views and must-see activities for people to share and drive visits.

3.1.13 **Locational awareness.** Using products such as Geo-Tourist, an audio tour website and app, to bring heritage points to life. Based on GPS location data, the tours take visitors around a route and play informative audio clips at various landmarks.

3.1.14 **Performative perfection.** Future travellers are social media conscious and will have a strong preference for tourism products that are contributing to their social capital / worth sharing and are easily shareable.

3.1.15 **Digital detox.** While visitors increasingly looking to switch off from the hectic pace of modern life, few are ready for a complete digital detox. There is a growth, however, in switching off experiences such as yoga retreats giving people a brief mental reprieve and opportunity to relax.

3.1.16 **Future travellers increasingly seeking authentic experiences and fully immersing themselves in local culture and atmosphere.** Travellers want to explore off the beaten track and understand what it is like to live, feel, eat and drink like a local. Food is a big part of the quest for authenticity. They will often turn to social media, such as Instagram, to find out from locals what are the genuine authentic experiences and not just tourist traps falsely portraying themselves as 'authentic'.

3.1.17 **Leisure upgrade.** Some travellers are looking for more than a pleasure rich experience. They want to combine their visit with learning additional skills, self improving activities or trying new experiences. Over 7 in 10 global consumers claim that entertainment should be about learning new things as much as simply having fun. Cultural learning has moved from the narrow confines of museums and educational tours to opportunities to enjoy a destinations cultural heritage in the form of craft brewery visits, food markets or community events.

3.1.18 **Augmented reality boosted by the success of Pokemon Go.** The next generation of augmentation tech will turn reality into a spectrum where virtual adjustments can be dialled up or down. A future of mixed reality where consumers can interact with digital objects in real spaces. Example: The Lost Palace, developed with Historic Royal Palaces. Explore an historical space that no longer exists vis handheld devices, binaural sound and haptic tech.

3.1.19 *Insight: Key challenges for operators to future proof the tourism offer on Hayling Island:*

- *Is the tourism product accessible at different price points?*
- *Do you know how your target groups define value?*
- *Is it expensive for visitors to reach the seafront?*
- *What differentiates Hayling from other destinations and makes it worth visiting?*
- *Would it be more appealing to visitors if they were aware of other tourism destinations in same area?. Are there any collaborations with nearby tourist attractions that would make sense?*
- *Do you allow tourists to tailor their experience of Hayling Island to their personal preferences?*
- *Is it clear what Hayling Island has to offer to visitors before they get there? What can we do to communicate this more clearly and excite people?*
- *How can you help guide visitors in getting the most out of their visit and avoid missing key experiences the Island has to offer?*

3. LOOKING TO THE FUTURE

3.2 Regional and local trends

3.2.1 Hayling Island's tourism sector is dominated by a small number of national chains including Bourne Leisure, Away Resorts and Parkdean Holidays achieving high levels of occupancy within the lower to mid-market range where price and demand is highly sensitive. Increasingly, these types of operators are looking to develop new quality offers to draw in a higher price premium. This might be achieved either through higher quality accommodation or improved provision of leisure activities and facilities within the park and can be seen in recent years with the development of new 'glamping' and premium cabin accommodation offers.

3.2.2 It is important that the seafront and wider tourism offer on the island increases investment to improve the quality of the visitor experience, otherwise holiday park guests will increasingly stay within the confines of their resorts, reducing the wider economic benefits to the island and leaving residents to make do with under-invested facilities.

3.2.3 Pressures on local government funding is a key concern particularly for coastal areas such as Hayling Island where the social make-up represents a higher than average population with long-term health problems, elderly populations and lower employment levels.

3.2.4 Opportunities to address seasonality of visitor demand on the seafront lie in enhancing the visitor experience and encouraging visits outside of the school holidays from specific market segments. Nationally, the markets offering the greatest potential for off-peak growth for Hayling Island include:

- Empty nesters (over 55's); health and wellness
- Under 35's; activity/ active breaks
- Building an audience from local residents within a 10 mile catchment.

3.2.5 Key long-term threats facing the future of tourism in Hayling Island include: availability of skilled staff, with tourism perceived as a low-skilled sector. Climate change is leading to increasing challenges from coastal erosion, flooding and storm damage which impacts on the sustainability of tourism infrastructure. This is clearly a significant issue for Hayling Island with a de facto policy of managed retreat of the coastline at West Beach, in the absence of Government Funding to maintain coastal defenses.

3.2.6 Changes to government policy in relation to taxation, benefits, funding, coastal defence, skills and education are have significantly high impacts on coastal populations. While a key challenge for tourism development on Hayling Island are the limited transport connections to the island and the availability of high speed broadband, WIFI and mobile reception.

3.2.7 Fluctuations in exchange rates and the current political uncertainties both in the UK, Europe and across the globe represents both a short-term opportunity for domestic tourism at the coast and a challenge for businesses and destinations to respond quickly to change.

3. LOOKING TO THE FUTURE

3.3 Growth potential for outdoor activity tourism at the coast

3.3.1 Hayling Island seafront has an opportunity to develop a strongly branded niche for active pursuit and activity holidays underpinned by its heritage as the 'home' of windsurfing.

6.3.2 The opportunity is supported by findings undertaken by the National Coastal Tourism Academy (NCTA). In 2017 the NCTA compiled 1,250 responses to an online questionnaire with a nationally representative sample of UK adults.

3.3.3 This established that 49% of people had been on an activity holiday in England during the previous year. Walking and cycling are the most popular activities but there is significant interest in water sports too. Activity holidays are popular across all age groups. The ideal activity holiday involved at least three different active experiences blended with a mix of other holiday activities. Successful holidays are not just about the activity, the local scenery, accommodation, food and drink and other attractions play an important part. 37% would choose a coastal destination for an activity holiday.

3.3.4 Activity holidays cover a wide range of activities from walking and cycling to more intense pursuits such as coasteering. The ideal activity holiday would include at least three different activities.

3.3.5 The national survey of popularity of activities, which are all possible on Hayling Island seafront were as follows:

Hiking / Walking 50%
Cycling 29%
Golf 16%
Horse Riding 15%
Wild Swimming 11%
Surfing / Body boarding 11%
Kayaking / Canoeing 11%
Sailing / Yachting 8%
Windsurfing / Kitesurfing 7%
Stand up Paddle Boarding 6%

3.3.6 Soft adventure activities such as cycling, walking and horse riding are less likely to be a key driver for the trip, and although many consumers consider undertaking these activities in advance, conversion to actually undertaking them is relatively low.

3.3.7 There is therefore an opportunity to improve communication about provision and ease of access for these activities to encourage more people to participate. The presence of an activity hub facility on Hayling Island seafront could support tourism growth.

3.3.8 Consumers like to 'pick and mix' their activities to create their own personal activity holidays, as well as combining these active experiences with other general holiday pursuits such as visiting sights, shopping and entertainment.

3.3.9 This presents a problem for the consumer; most activity providers set their business up because of a personal passion for a single activity and often offer just this one, or a limited number of similar activities. That is therefore a key challenge for activity providers, destinations and other businesses to make it easy for visitors to find out about and book a variety of activities. Successful holidays are not just about the activity. Both providers and holidaymakers agree that the "Local Feel" is an important contribution to the holiday.

3.3.10 The love of 'local' is common ground for people taking activity holidays on the English coast. Participants in the survey identified a range of additional facilities to make their activity holiday better, including:

- Local maps and guidance (61%)
- Free WiFi access (57%)

3.3.11 To make activities more appealing, those surveyed identified a need for:

- Food on site (57%)
- Local food and drink recommendations (53%)
- Showers at the activity venue (54%)
- Equipment for hire (47%)
- Transport between locations / activities (48%)
- Social time to get to know other participants (29%)
- Activities for children (26%)
- Souvenirs / Mementos (23%)
- Photographers (14%) n.b.: this rises significantly for horse riding, motor sports, climbing and water sports activities

3.3.12 Accommodation specific requirements include:

- Clothes washing and drying facilities (49%)
- Packed lunches available (32%)
- Storage facilities for activity equipment (30%)
- BBQ / Outdoor eating equipment for hire (29%)

The survey revealed the coast is perceived as satisfying important customer needs for beautiful natural landscapes, good places to eat including pubs and cafés, a feel for local life and a welcoming environment for tourists. These aspects can be highlighted within branding and marketing across Hayling Island and its seafront.

3.3.13 However, there are other features important to customers which the English coast is not perceived to deliver as well.

3.3.14 Finally, the report identifies tourism accommodation preferences by age group:

- Under 35's prefer to stay in cottages (38%), family hotels (32%), holiday parks (30%), independent B&Bs (29%), private apartments eg: Airbnb (29%) and glamping (27%).
- - 35 to 55 year olds prefer cottages (54%), followed by independent B&B's (38%), Holiday Parks (35%), Family hotels (34%), Glamping/ Cabins (31%), static caravans (30%).
- Over 55s prefer cottages (59%), independent B&Bs (45%), traditional independent hotels (38%), Pubs/ restaurants with rooms (32%) and family hotels (31%).

3.3.15 *Insight: development of a water sports and activity hub at West Beach coupled with a sensitively developed beach based visitor accommodation offer could help to differentiate and brand Hayling Island seafront as the home of coastal water sports. Accommodation could develop around overnight stay beach huts, camper van or camping experiences that could sit lightly without detracting from the high quality natural environment.*

3. LOOKING TO THE FUTURE

3.4 All-weather commercial leisure attraction

3.4.1 Prospects of introducing a major commercially viable all-weather leisure attraction onto Hayling Island seafront are unlikely. With a resident island population of less than 17,000 any commercial facility would be heavily reliant on achieving a high turnover of visitors by appealing to the 1 million plus catchment population within 1 hours drivetime, drawing significant additional traffic to the island. The scale of the facility to attract this audience would have to be significant and of sufficient appeal to attract a year-round audience. It is likely that the required scale of development would have a negative impact on the surrounding natural environment.

3.4.2 Typically, such commercial facilities are to be found only in larger seaside resorts with extensive road and rail transport connections and significant parking provision. Also, such facilities as indoor leisure pools have historically only been established on seafronts where alternative beach or coastal based leisure appeal or access has been weak. Think of Brighton and Blackpool, two major resorts with significant catchment and visitor numbers where the appeal is based around urban based leisure attractions and not around the beach or water.

3.4.3 By contrast, seafronts with a strong beach and coastal offer struggle to maintain viable all-weather facilities because it is very hard to create alternative attractions that can compete against the pull of the beach or water when the weather is good. Bournemouth is a relevant example here. The only significant seafront based all-weather attraction here is the Oceanarium. To maintain viability this business relies on year-round marketing to attract some of the 450,000 resident population within the wider conurbation plus some of the 7 million annual visitors. This type and scale of attraction would not be viable on Hayling Island seafront.

3.4.4 There is some community aspiration to introduce an all-weather aquadome water park attraction with associated spa and exhibition facilities to Hayling Island seafront. This would represent a high capital investment with little prospect of producing sufficient return based on catchment audience and transport accessibility to be viable. Some elements of the proposal are already replicated on Hayling Island with indoor and outdoor leisure pools featuring at Mill Rythe and Parkdean holiday parks.

3.5 Leisure Marine sector

3.5.1 Leisure marine represents another key sector for Hayling Island's economy with significant opportunities for further growth. Hayling Island sits within Hampshire's wider Solent region where around 3,000 marine businesses are based. The UK has the largest marine sector in Europe and employs over 360,000 people, contributing £19 billion gross value added to the economy.

3.5.1 Hayling Island features three major marine facilities, offering berthing and support services for leisure boat owners. Across the UK, Marinas and mooring facilities contributed £222 million to the economy in 2016.

Research undertaken for Visit Britain in 2015 indicated that around 5 million domestic holidays that year involved some form of boating activity, contributing £1.7 billion via direct and indirect tourism spend. There are around 690,000 boat owning households in the UK. The leisure boating heritage of the Solent area contributes to its continued appeal and popularity and presents opportunities to develop the marine leisure offer with a strong brand appeal. The Northney Marina site presents particular opportunities for economic growth.

4. IMPACTS OF TOURISM ON ISLAND LIFE: PRESENT AND FUTURE TRENDS

4. IMPACTS OF TOURISM ON ISLAND LIFE: PRESENT AND FUTURE TRENDS

4.1 Background

41.1 Coastal towns and communities share the defining feature of a 180-degree hinterland with the coastal shoreline limiting the catchment area, often reducing economic and social opportunities and access to services for residents, compared to inland communities of similar size and make up.

4.1.2 Transport links are often poor or suffering from relative under-investment due to the majority of coastal communities being located at 'the end of the line'. The case for infrastructure investment can often be hard to make for communities with relatively small economies and limited growth prospects but high levels of seasonal fluctuating demand putting pressure on road, rail and other transport networks. The impacts on existing local productivity and community development can be significant.

4.1.3 Environmental impacts are often felt first and most acutely in coastal areas, particularly around coastal erosion, flooding and marine pollution. Preserving or enhancing high quality coastal landscapes comes with additional abnormal responsibilities and challenges for Local Authorities and resident communities.

4.1.4 All of these challenges are to be found on Hayling Island, and this next section explores some of these issues further and identifies how a sustainable approach to tourism development can have a positive impact for the local community.

4. IMPACTS OF TOURISM ON ISLAND LIFE: PRESENT AND FUTURE TRENDS

4.2 Population and demographic summary

4.2.1 The population of Hayling Island in 2011 was 17,379 and it is estimated to increase by 2021 to 18,565. The median age of residents is 52 year old.

4.2.2 A study of 274 coastal settlements in England and Wales identified that 20% of the population were aged 65 and over, compared to 16% nationally. In Hayling Island 29.6% of the population are aged over 65, with 24.7% describing themselves as retired.

4.2.3 Coastal Local Authorities are projected to be the most affected by an increase in the proportion of the oldest population age group over the course of the next twenty years (ONS Population projections 2014–2039). Havant Borough Council's population profile (Jan 2018) identifies that the Borough has an ageing population. As the population continues to age there will be a corresponding drop in the proportion of working age people. The 2011 census shows that for every 100 working age people, there were 61 older people. This is predicted to rise to 71 by 2021, with resultant increases in social care and health care costs.

4.2.4 Retiring to the coast is an aspiration for many and is contributing to the rapidly aging profile of coastal populations with 65% of people aged 65 or over retiring from London moving to coastal local authorities (Pennington 2013).

4.2.5 West Hayling ward features within the 20% most deprived areas in England. Coastal settlements are also experiencing outward migration of young people, seeking employment opportunities and affordable places to live coupled with the inward migration of transient workers attracted by seasonal employment opportunities.

4.2.6 The influx of older populations present some untapped opportunities with research showing that older people often wish to remain economically and socially active beyond retirement age. There is also some evidence to suggest that older people are more successful in starting and sustaining a new business than their younger counterparts (CCA, 2010).

4.2.7 In 2011, almost one third of Hayling Island's population were in the 45-64 age group, although this group is predicted to decrease to a quarter while those aged 65 years and over are predicted to increase. As such, the decrease in residents of a working age will lead to an increased dependency ratio of 80% by 2021.

4.2.8 The proportion of elderly residents is expected to remain high in future years owing to the island's attractiveness as a retirement destination. This age structure presents challenges for Hayling Island.

4.2.9 In 2011, 69% of homes on Hayling Island were owner-occupied (i.e. owned outright or with a mortgage or a loan). This is the same as the household ownership proportion for the Borough as a whole. More specifically however, 15% of Hayling households were occupied by a single resident over the age of 65 years at this time.

4.2.10 *Insight: Improvements to the seafront need to cater for this core local population. Key moves to improve access to and across the seafront and encourage greater participation in healthy lifestyle activities such as walking, cycling and water sports should be encouraged. Shelters and seating should also be developed. Increased activity and engagement by an ageing local population could have significant positive impacts, keeping people healthier and fitter for longer and reducing the pace of demand on social and health care budgets for the Local Authority and Health Services.*

4. IMPACTS OF TOURISM ON ISLAND LIFE: PRESENT AND FUTURE TRENDS

4.3 Local Employment

4.3.1 Across the UK, on average, coastal settlements have lower rates of employment with the availability of jobs impacted by the seasonal nature of local economies and work often being low-skilled and low-paid. Declines in traditional coastal industries and limited transport connections to a smaller hinterland often contribute to the problem.

4.3.2 Unemployment across the UK, including within coastal settlements, has been on the decline and is now at its lowest level since 1975 (ONS 2017). Nationally, of the 13.5 million people living in poverty, 7.4 million (55%) are in working families (RSA, 2017). This is shifting the national focus towards creating better quality jobs. (CCA 2018)

The proportion of unemployed on Hayling Island according to the 2011 census was 3.2% and those aged under 18 made up 15.3% of the local population. 8.4% of the local population were employed within the accommodation and food industry in 2011.

4.3.3 Tourism remains a significant employer on the island, helping to encourage working age families to stay and work locally. Sustaining and developing local employment on the island will help to reduce the impacts of commuting to the mainland and the effects this has on traffic.

4.4 Transport and access

4.4.1 Residents responded to a recent Hayling Island transport and travel survey in December 2017.

- 816 out of 1717 people surveyed agreed that a comprehensive footway and cycleway network would contribute to reducing congestion.
- 45% say they would use the Billy Trail as a commuter route if it was upgrade to an all-weather surface.
- 53% say they would cycle more if cycle routes were increased and improved.
- 41% of surveyed frequently use a bicycle.
- 55% say they would regularly use the ferry if bus connections either side were improved.

4.4.2 The Hayling Billy trail runs along the old railway line from the north of the Island down to Sinah Lane. It is well used by walkers, cyclists and horse riders but does not feature an all-weather, year round surface. To encourage further use and improved connectivity, resurfacing and lighting may be required. Part of the route may need to move in-land to avoid areas of coastal erosion where the Shoreline Management Plan policy is for no intervention.

4.4.3 Hampshire's Local Transport Plan 2011 – 2031 identifies the need for critical infrastructure upgrades to support growth, particularly around developing sustainable modes of transport onto Hayling Island.

4.4.4 At present two bus services connect the Island with the mainland every 15 minutes.

4.4.5 The Hayling Ferry service connects Hayling with Eastney Point and operates Summer and Winter Timetables. The current privately run operation was launched in August 2016 and can carry up to 64 foot passengers. A trial public transport link connecting the service either side has not been well used and its viability is in question. Connecting sustainable transport links in the form of improved cycle routes / cycle hire and pedestrian wayfinding could prove more viable in the long term.

4. IMPACTS OF TOURISM ON ISLAND LIFE: PRESENT AND FUTURE TRENDS

4.5 Natural Environment

4.5.1 Central to developing and sustaining the future of the seafront is a recognition of the importance of its high-quality natural environment.

4.5.2 The high value of the seafront environment which includes Sinah Common SSSI and adjacent Solent Maritime SAC is key to understanding the tourism appeal and unique selling point for Hayling Island's future branding and marketing. Proposals for improvement on the seafront need to respond to these issues by enhancing areas of wilderness and concentrate tourism and residential development in key 'honeypot' sites.

4.5.3 Central to developing and sustaining the future of the seafront is a recognition of the importance of its high quality natural environment. The Council has prepared a Landscape Capacity Study that, with respect to the seafront, aims to:

- Balance tourism and residential development demands with the retention of character of remaining rural areas
- Retaining the remaining open space landscapes and common on the sea front should be an important part of future tourism initiatives / development on the island
- Avoid redevelopment of housing plots on Seafront Road which would impact on the open character of the coastal plain. AE note this aim runs counter to proposals for Creek Road and Eastoke Corner sites.

4.5.4 The assessment identifies that the seafront offers:

- At the western end, open access heathland and grassland bordered to the north by the Coastguards Conservation Area and a group of listed buildings including Norfolk Crescent and Royal Hotel.
- The landscape offers open, panoramic views and forms part of Sinah Common SSSI and adjacent Solent Maritime SAC.
- Some development potential, identified around the surf shack kiosk and toilets area but elsewhere development not encouraged due to concern that the otherwise open character and planting could be lost.
- The shoreline features within the floodplain where, to the west, coastal defenses have been removed and the Shoreline Policy is for no further intervention.
- Potential for enhancing the built environment and the setting of historic buildings and areas.
- An accessible seafront to the west with car parks located at intervals. To the east private dwellings align along the seafront limits access to the adjacent promenade.
- The open and exposed landscape adjacent to the sea front contrasting with areas of enclosure within the built environment.
- Moving eastwards, poor built elements detract visually from the seafront.
- Extension of settlement into the undeveloped beach front would require Landscape mitigation and contribution to green infrastructure.

4.5.5 The high value of the seafront environment is clear and is equally key to understanding the tourism appeal and unique selling point for Hayling Island's future branding and marketing. Proposals for improvement on the seafront need to respond to these issues.

4.6 Coastal Management

4.6.1 Hayling Island seafront sits within the flood plain and is highly vulnerable to sea level rises. The adopted Shoreline Management Plan contains a number of significant implications for the future visitor appeal of the seafront.

4.6.2 In recent years, flood defenses within the Eastoke area have been improved to protect around 1700 homes from flooding over the next 100 years. Currently, an annual beach re-nourishment is funded through to 2022. At the western end of the seafront coastal defenses have been dismantled and a policy of no intervention is under review due to lack of available public funding. Along the west coast running parallel with the Hayling Billy Trail the policy of 'no active intervention' has also been adopted.

This policy will result in a gradual loss of access along the shoreline south of the golf course in the decades to come and will also result in the eventual loss of the Hayling Billy Trail, which will need to be re-routed in land at some point.

5. URBAN DESIGN OPPORTUNITIES- THE JOURNEY

5. URBAN DESIGN OPPORTUNITIES

Three interconnected sites

The Hayling Island seafront sites that stretch west to east from West Beach- Beachlands- Eastoke have the ability to become a family of three distinct but connected sites that serve a modern, environmentally aware visitor as well as residents.

Opportunities for connection between sites will take the form of improved walking and cycling routes and a suite of wayfinding signage.

5. URBAN DESIGN OPPORTUNITIES - WEST BEACH

The future of Hayling Island seafront in 2030

The following key principles have been developed for the West Beach site and the vision of what it could provide residents and visitors in 2030.

1. Activity and experience based place which takes advantage of the natural qualities of the island. A wild landscape aesthetic as part of any development with an emphasis on natural and native planting which is complementary to the nearby SSSI.

2. A multi-generational, accessible place where people can come together to socialise and become immersed in a natural beach front environment.

3. A hub for health and well-being to experience the landscape through activity: walking, cycling, running, water-sports.

4. Clear communication of what is on offer which still allows some parts of the Island to feel undiscovered.

5. Green links, including greater connectivity with the ferry, to support the growth & performance of the experience economy and activities available on the beach front sites and around the wider Hayling Island area.

5. URBAN DESIGN OPPORTUNITIES - WEST BEACH

Study area

The existing West Beach site has retained much of its natural beauty, despite development to the East of the site. Both the beach and the green area behind are kept fairly untouched are loved by visitors and residents alike . However, the existing cafe and toilet facilities on this part of the site is outdated and street furniture is unattractive, poor quality and location does not seem to have been properly considered to make the most of views to the Solent.

Current play offerings are sad to put it mildly.

Kiosk is unappealing to a modern day consumer and toilet facilities are outdated.

Current public seating does not seem to have been carefully considered.

Camper-van parking is currently prohibited for overnight stays due to safety concerns.

Bins are currently unattractive and could be set back from the sea front.

Beach huts could be made more attractive through better alignment, re-painting etc. There existing location also makes them vulnerable to storms and erosion.

5. URBAN DESIGN OPPORTUNITIES - WEST BEACH

Opportunities

Key

1. 'Barefoot' Cafe
2. Seafront Activity Centre (changing, classroom, storage and hire facilities for watersports/cycling)
3. Kid's play
4. Short-stay beach hut accommodation (4~ possibility for additional)
5. Camper-van short stay area
6. Public seating- an 'amphitheatre' to watch kite surfing/ water-sports / ships
7. Public BBQ area
8. Existing Beach huts and relocation of existing beach huts East of Inn on the Beach
9. Semi- public Toilets
10. Inn on the Beach and Car Park
11. Car parking
12. Way-finding intervention info about public realm activities and Hayling's natural features
13. Car parking
14. Landscaped area
15. Existing golf club and car park

5. URBAN DESIGN OPPORTUNITIES - WEST BEACH

1.
Cafe/Kiosk serving quick, good quality food for walkers and windsurfers with space to sit inside in bad weather.

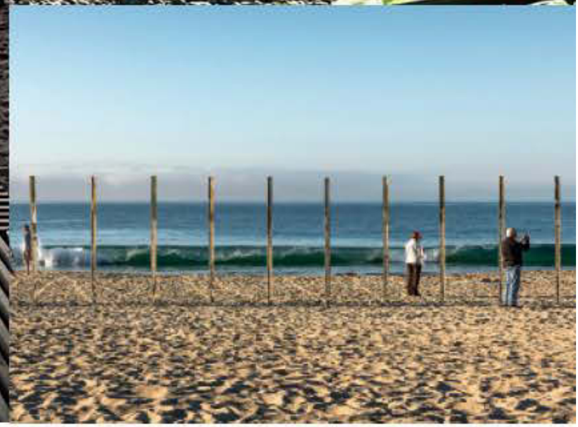
2.
Water sports facility could include a changing area, basic facilities for maintenance and notices of upcoming competitions.

5. URBAN DESIGN OPPORTUNITIES - WEST BEACH

4.
Short stay lodges could provide an alternative to camper vans or and encourage people to stay in the area, particularly for families and the water sport activities. There should also be wheelchair-accessible and dog friendly options.

5.
Better parking opportunities which do not disrupt views to the sea and allow for revenue generating short-stays in camper-vans. Public toilets could be accessible all hours for 'camper-vaners' using key fob.

5. URBAN DESIGN OPPORTUNITIES - WEST BEACH



6.
Opportunities for on-the-beach activities including beach yoga, outdoor gym equipment or posts for hanging up hammocks.

7.
Attractive public seating to lookout over the water and watch windsurfers. Wind shelters for protection when coming out from the water.

5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

The future of Hayling Island seafront in 2030

The following key principles have been developed for the Beachlands site and the vision of what it could to provide residents and visitors in 2030.

1. Small scale and family-friendly, overnight or short-stay opportunities that overlook the beach front.

2. Beautifully designed apartments and housing

3. Sea view cafes / restaurants with an independent focus.

4. Public space and landscaping that is an inviting connection to the beach and a destination in its own right

5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

Study area

Beachlands consists of the amusement arcade, funfair, car parks, cafes and small food/ drink mobile vendors all of which have seen better days and are not "in step" with modern tastes. The site has been neglected and does not offer many activities that are attractive to diverse audiences or that activate the site all year round.

We propose to relocate the principal leisure focus away from Beachlands to Eastoke. Commercial leisure development on both sites would struggle for viability in the current and projected leisure market. Concentrating leisure regeneration on one site will allow for the creation of a modern offer with sufficient critical mass to be sustainable.

Entrance to the site is old fashioned and uninspiring


Current food and drink offers are unattractive, or quality and design does not exploit views to the seafront


Entrance to the train is small and not attractive


Parts of the site currently being used for community events


Current entrance to the funfair site is not inviting or characterful


Fairground and other attractions do not address the beach well

5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

Proposed

4 5 bed staggered terraced homes
4 4 bed detached homes
8 3/4 bed terraced homes (2/3 storeys)
4 3 bed terraced homes with integral parking (three storeys)
6 4 bedroom semi-detached homes
90 two bedroom apartments (three storeys)
10 family beach lodges
6 2 person beach lodges

Existing-

Funfair, 5 existing buildings including public toilets, amusement arcade and cafes.

Relocated facilities-

Tourist Information Centre to be relocated alongside leisure facilities at Eastoke.
Key

- Semi-detached houses
- Terraced houses
- Staggered terraced houses
- 2 Bedroom apartments
- 2 Bedroom apartments
- Detached house
- Terraced houses with integrated garage
- Short stay leisure accommodation
- Short stay leisure accommodation with ground floor commercial

5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

Apartments

The apartment housing opportunity for the Beachlands site could include low rise apartments (max 3 stories) and made from natural materials that are in keeping with the beach front setting

5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

Housing

The Beachlands site could provide new, modern homes for families on Hayling Island. These could use natural materials and a colour palette that blends with the landscape, embedding the house in their coastal location and suited to the low-rise development existing on Hayling Island.

5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

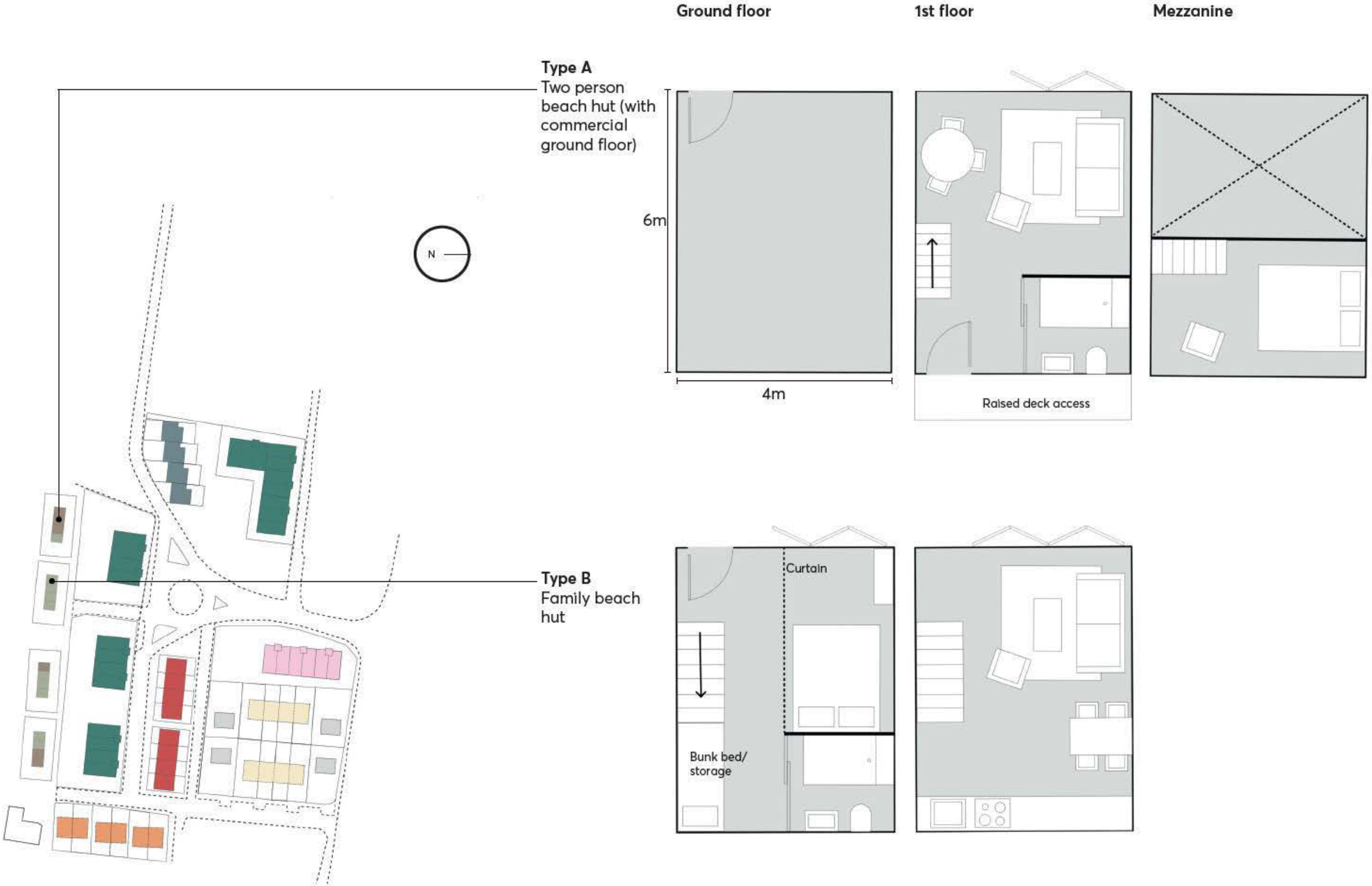
Short stay accommodation

Mix-use short-stays could offer a new type of leisure accommodation on the island, including views to the beach or green space to the East of the site. These could be adapted to include small retail units and F & B opportunities for this part of the site.

5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

Short stay accommodation

Beach hut floor plans

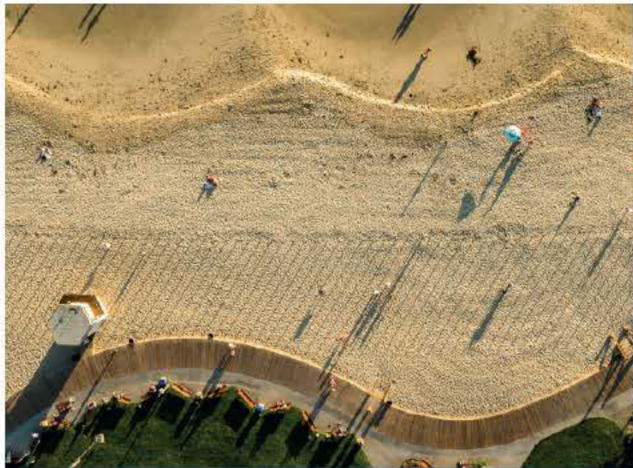


5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

Public amenity space

This area of public space could connect and guide people from the development on the site to the beach front

- Landscaping to aid accessibility to the beach
- Public BBQs
- Bike racks and cycle path
- Children's play area
- Seating and picnic benches



5. URBAN DESIGN OPPORTUNITIES - BEACHLANDS

Key

- Semi-detached houses
- Terraced houses
- Staggered terraced houses
- 2 Bedroom apartments
- 2 Bedroom apartments
- Detached house
- Terraced houses with integrated garage
- Beach huts
- Beach hut with ground floor commercial

Accommodation Schedule

House type	Bed no.	Type	Storeys (of total unit)	No.	Area (Approx) mSq.
A	4	Semi-detached	3	6	142
B	3/4	Terraced	2/3	4/4	94/142
C	3	Terraced	3	8	94
D	2	Apartment	3	66	80
E	2	Apartment	4	24	80
F	4	Detached	3	4	142
G	5	Terraced	3	4	238
H	4	Overnight beach huts	2	10	48
Ia	2	Overnight beach huts	2	6	24
Ib	N/A	Commercial	2	6	24
Total				142	

Gross to Net ratio for apartments: 80%

5. URBAN DESIGN OPPORTUNITIES - EASTOKE

The future of Hayling Island seafront in 2030

The following key principles have been developed for the Eastoke site and the vision of what it could provide residents and visitors in 2030.

1. Leisure focused site with a mixture of paid for and free small-scale recreation facilities that are attractive to residents and visitors to Hayling Island.

2. Encourage activity at this part of the water front all year round and evening through a relaxed modern beach restaurant that spills onto the sand.

3. Good connections to accommodation and housing offers to the West of the beach front.

4. A variety of good quality kiosks that offer good quality, exciting, modern food and drink options, rental opportunities.

5. Co-location of leisure and retail to aide the existing retail and cafe's / restaurants at Eastoke

5. URBAN DESIGN OPPORTUNITIES - EASTOKE

Study Area

Eastoke is located East of Beachlands and offers more free leisure opportunities, higher quality shopping and food and drink outlets. There seems to be only some connection made between this site and the beach which could be enhanced.


Arcade and beach cafe are dated


Good quality outdoor gym equipment


Good quality children's sandy play area


Events space at Eastoke stages free live music events e.g. Hayling Folk and Acoustic Festival 2018


Unattractive and dated public toilets


Underused green space

5. URBAN DESIGN OPPORTUNITIES - EASTOKE

The best of the current leisure activities offered at Beachlands could be moved to Eastoke, where there are already some existing good quality facilities. The idea is to create a destination by co-locating the shops / cafes / leisure to one unified site that has a clear identity.

Concentrating the new leisure offer at Eastoke over Beachlands will enable delivery of modern leisure facilities with sufficient critical mass to be sustainable, rather than spread across both sites. The Eastoke site lies within Council ownership, potentially providing greater flexibility to deliver on the wider vision. Proximity to existing retail and leisure will enable regeneration of the site to deliver greater impact for the local economy and existing businesses.

The **current facilities** at Eastoke include:

1	Public Toilets
2	Events ampitheatre (events listed here)
3	Parking spaces
4	Outdoor gym
5	Playground
6	Public seating
7	Event space
8	Small train station
9	Car parking
10	Pocket Park

Some of these are in good condition and are well used by the Hayling Island community.

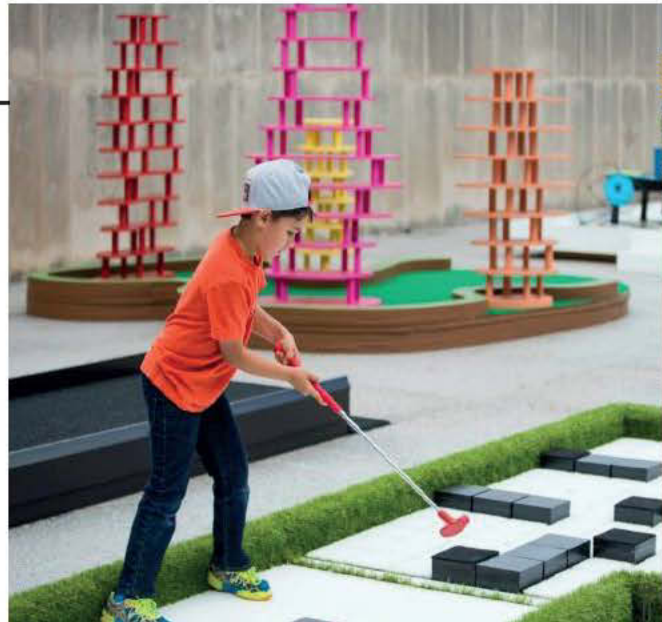
5. URBAN DESIGN OPPORTUNITIES - EASTOKE

Existing leisure facilities that could stay on the site include the playground and outdoor gym. Future leisure facilities for local residents and visitors to Hayling Island could include:

1. Cafe/ Indoor/ outdoor food court
2. Modern Mini golf
3. Outdoor gym (existing)
4. Playground (existing)
5. Relocated skate park
6. Splash zone
7. Kiosks
8. Tourist information and public toilets
9. Pop-up market or visiting amusements
10. Extended car parking/ space for events e.g. carboot sales
11. Mixed use commercial/residential development
12. Traffic calmed street
13. Small train station
14. Additional on street parking spaces

5. URBAN DESIGN OPPORTUNITIES - EASTOKE

1.
Family friendly, informal dining and bar. A mix of indoor and outdoor seating spilling onto the beach and helping to activate the site at night.



2.
Modern take on mini golf and sea-side games

5. URBAN DESIGN OPPORTUNITIES - EASTOKE

5.
Elements of the existing skate-park could be moved and form park of a new, well landscaped skate-park

6.
Water play could be incorporated into the landscape design

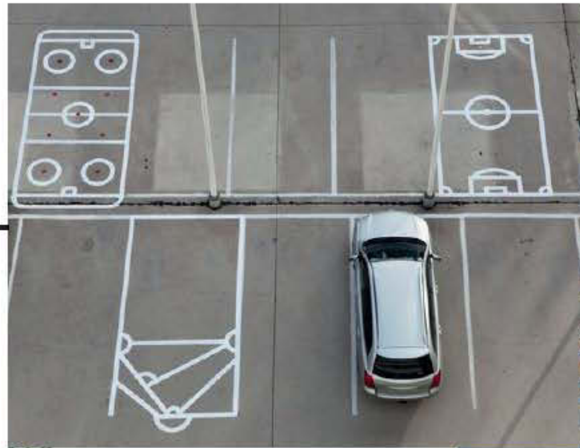
5. URBAN DESIGN OPPORTUNITIES - EASTOKE

7.
A well-curated offering of kiosks and vans selling good quality food and beach memorabilia.

8.
Public toilets/ tourist information with showers and dog washing facilities

5. URBAN DESIGN OPPORTUNITIES - EASTOKE

9.
A more viable option to allow young, small, start up businesses to find a space on Hayling Island



10.
This car park could act as a flexible events space for car boot sales, pop-up outdoor cinema screenings or a temporary fairground in peak seasons.

5. URBAN DESIGN OPPORTUNITIES - EASTOKE

Key

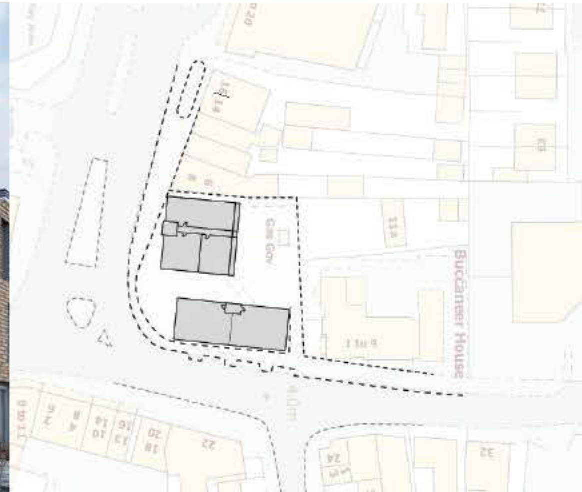
Mixed use- Ground floor commercial and apartments

Apartment block

Accommodation Schedule

House type	Type	Bed no.	Storeys	No.	Area mSq. (approx)
A	Apartment	2	4	6	**96**
A	Ground floor commercial	N/A	4	3	72
B	Apartment	1/2	3	6/3	**64/95**
Total				15+3	

11.
This currently under-used public space could provide mixed use residential units. This could help create more opportunities for new independent businesses at Eastoke.



5. URBAN DESIGN OPPORTUNITIES - EASTOKE

11.
More attractive green space and walk way to increase use of the existing underused area and create a welcoming entrance to the Eastoke site

12.
Pedestrian friendly streets that slows down traffic and help to increase trade from existing shops and cafes

5. URBAN DESIGN OPPORTUNITIES - SOUTHWOOD ROAD

The future of Hayling Island seafront in 2030

The following key principles have been developed for the Southwood Road site and the vision of what it could provide residents and visitors in 2030.

1. Creating a beautiful, design-led residential development that upgrades the perception of the area.

2. Improve the quality of public realm through better landscaping that inspires play in the existing pocket park.

3. Maintain the flood defence function of the seafront site.

4. Maintain vistas to the seafront from Southwood Road.

5. URBAN DESIGN OPPORTUNITIES - SOUTHWOOD ROAD

Study Area

The area around Southwood Road is mostly residential housing. The proposed regeneration zone comprises of under-used and low-key play spaces, low-rise apartment blocks and poorly kept community infrastructure. There is opportunity for the site to be re-developed and to offer a mix of high-quality family homes, apartments and inviting play spaces. However, it is to be noted that the Wheatlands Avenue site is unlikely to become available for development in the short term.

Uninspiring design of playground that lacks excitement

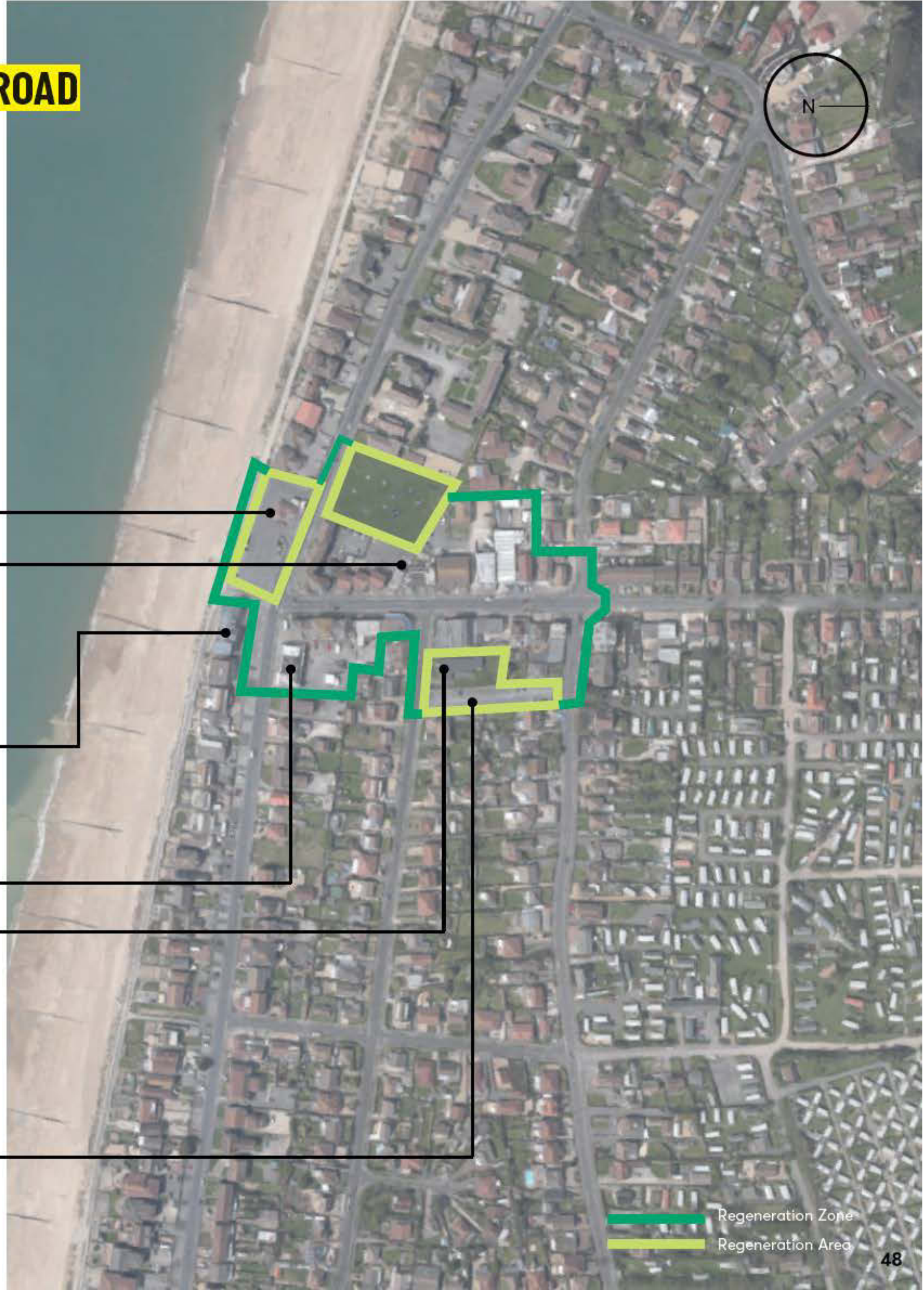
Existing Creek Road car park takes up a prominent position of the site overlooking the beach and seafront.

Dated housing surrounding the site

Existing new buildings are poorly designed

Underused car park offers an opportunity for redevelopment. Currently it does not provide an attractive connection between Wheatlands Road and Sandy Point Avenue.

Existing community centre on the site is unattractive and unwelcoming



5. URBAN DESIGN OPPORTUNITIES - SOUTHWOOD ROAD

Proposed-

2x 3/4 bed semi-detached homes (two/three storeys)
4x 4 bed terrace homes (three storeys)
20x 2 bed apartments (two/ three storeys)
Pocket park

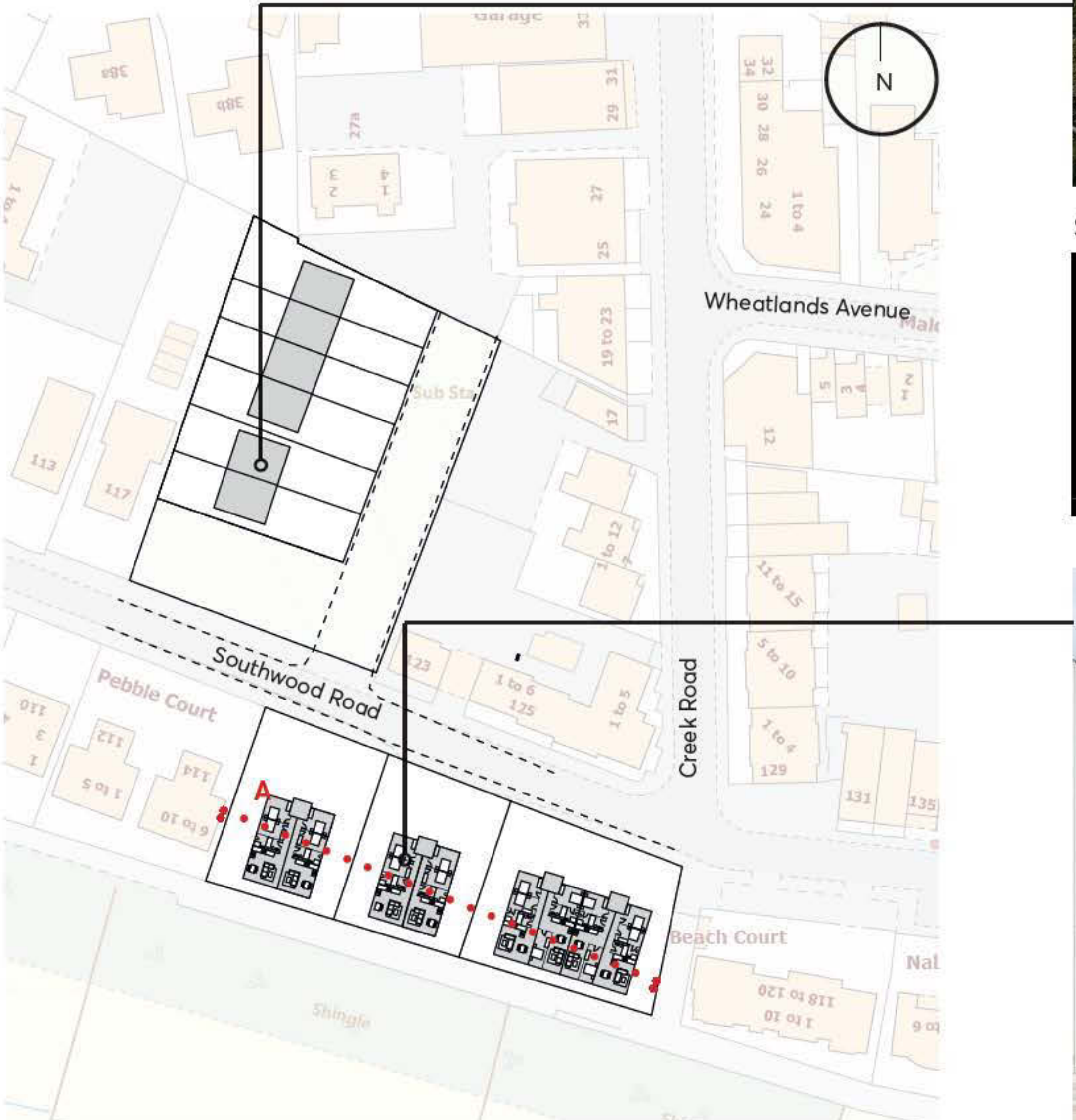
Existing-

Play ground
Car Park

Key

- Terraced Houses
- Semi-detached houses
- Two bedroom apartments

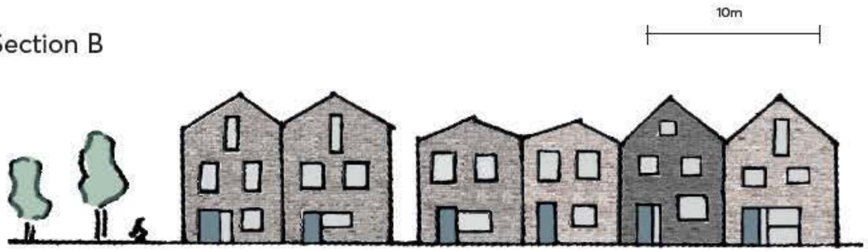
5. URBAN DESIGN OPPORTUNITIES - SOUTHWOOD ROAD

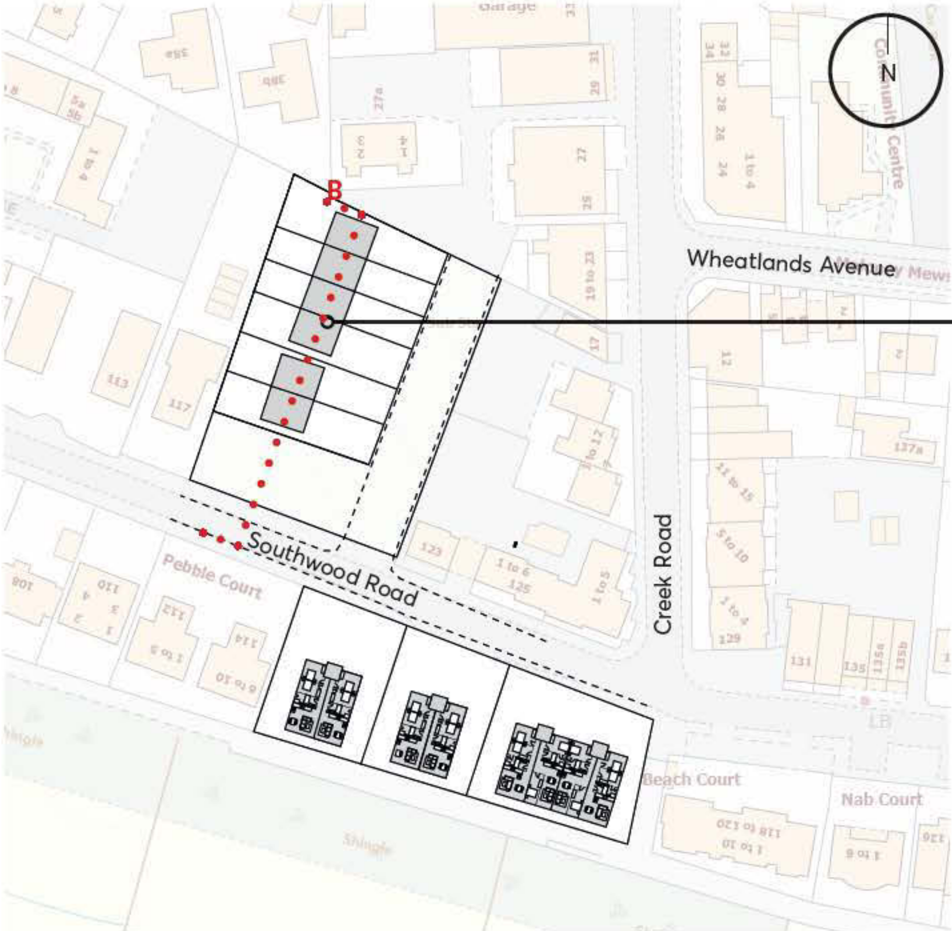


Section A

5 URBAN DESIGN OPPORTUNITIES - SOUTHWOOD ROAD

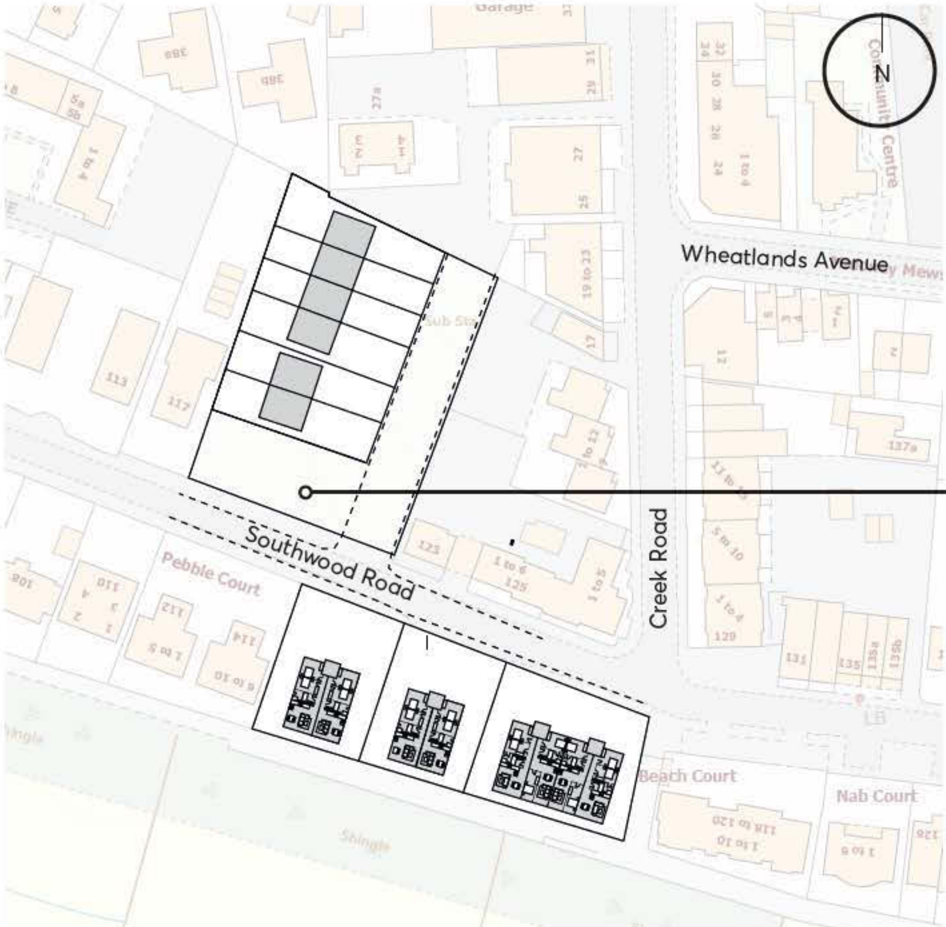
Section B





5. URBAN DESIGN OPPORTUNITIES - SOUTHWOOD ROAD

The green space at Creek Road could be consolidated and made more attractive to use than the existing space with better play facilities, spaces to sit and connection to the community centre.

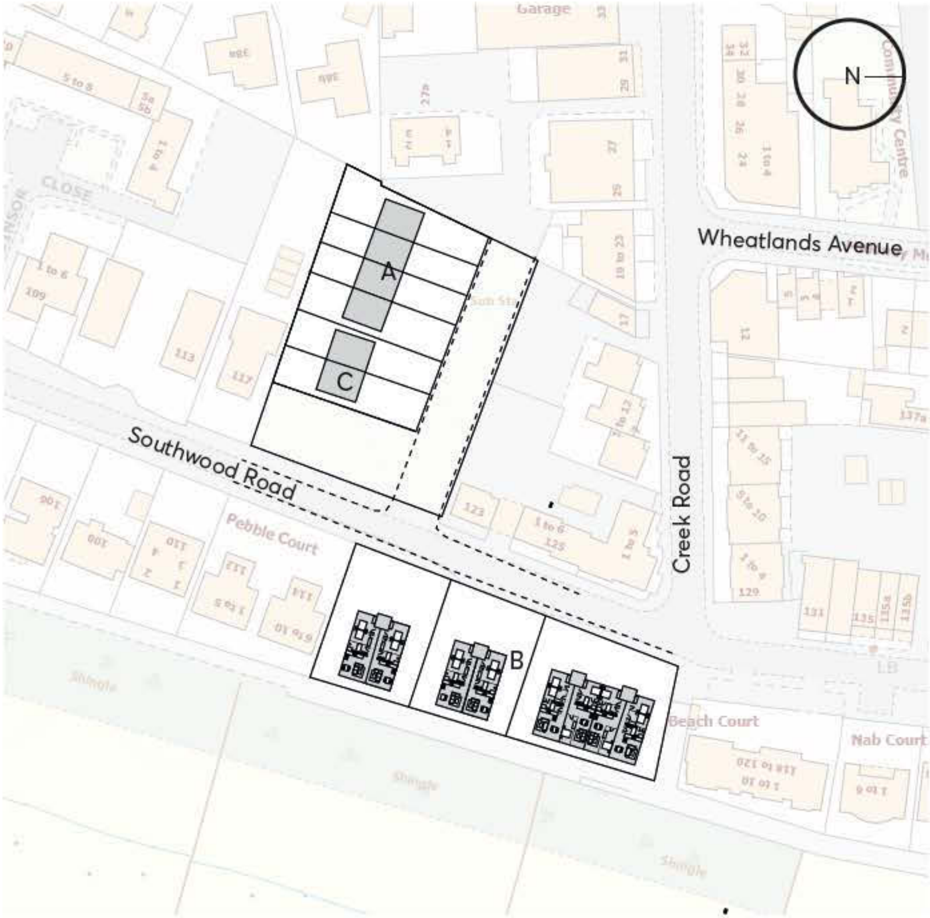


9. URBAN DESIGN OPPORTUNITIES - SOUTHWOOD ROAD

Accommodation Schedule

House type	Bed no.	Type	Storeys	No.	Area (approx) mSq.
A	3/4	Terraced	2/3	4	**94/142**
B	2	Apartment	2/3	20	**80**
C	2	Semi- detached	3	2	**142**
Total				26	

Gross to Net ratio for apartments: 80%



5. URBAN DESIGN OPPORTUNITIES - JOURNEY

The future of Hayling Island seafront in 2030

The following key principles have been developed for the journey and the vision of what it aims to provide residents and visitors in 2030.

1. Landscape that encourage walking and cycling through more clear, accessible and attractive routes.

2. Street furniture that is thought through, goes together and helps to create a sense of place.

3. Help connect the sites and make the seafront feel more together.

5. URBAN DESIGN OPPORTUNITIES - JOURNEY

Study Area

The journey between the Westbeach and Beachlands sites has some good quality amenities, however, these can remain unknown to visitors due to a lack of way finding. Existing landscaping does not encourage all abilities to enjoy the nature around this area is limited due to lack of safe walking and cycling routes.


Skate-park is positioned out of the way from other fun and youthful amenities.


Some empty, poor quality public spaces.


Attractive beach volleyball court, however, hidden to visitors who might not know it is there already.


Attractive play equipment could be more integrated into the landscaping and more characterful.


Road between the sites does not have a clear, safe foot or cycle path which is accessible for pushchairs and wheel chairs.


High quality natural landscape, however public seating is of poor quality, mixed types and poorly placed

5. URBAN DESIGN OPPORTUNITIES - JOURNEY

Study Area

The journey between Beachlands and Eastoke has been left quite untouched. Currently, there is a path between them, however, it travels beside the road rather than taking in the sea views. There are few public seating spots and those that do exist are also set back from the sea front towards the road.


Public toilet facilities and mobile food/drink traders


COPP Memorial part of the Hayling Island World War II Heritage Trail


Poorly placed public seating close to road and set back from seafront.


Some wooden play/ exercise equipment


Picnic benches sheltered but seperated from sea views


Some bright, well kept beach huts

5. URBAN DESIGN OPPORTUNITIES - JOURNEY

1 Architectural wind shelters placed along the beach front which connect with the natural landscape.

2 Bike pumps and stands made of natural materials that blend in with the landscape and encourage people to cycle

3 Recycling bins to promote a clean beach and ecological awareness

1

2

3

5. URBAN DESIGN OPPORTUNITIES - JOURNEY

4 Existing beach huts could be painted and moved to a more rational layout

5 Clear pedestrian/ cycle path. The Billy Trail an important element to Hayling's history and a beautiful asset. The route leads to this southern point of the island and visitors could be encouraged walk or cycle here with clearer way-finding and more accessible, yet natural, landscaping.

4

5

6. SUMMARY AND RECOMMENDATIONS

6. SUMMARY AND RECOMENDATIONS

6.1 Summary Evaluation

6.1.1 The recommendations for regeneration of Hayling Island seafront are designed to meet a series of key objectives identified by the Council. Namely, to make a positive contribution to the Island's visitor economy; transform the seafront by maximising use of the sea, enhancing the quality and range of attractions, public realm and natural environment; focus for improvement centred around four key sites; connecting the site through a logical series of routes across the whole seafront that are accessible to all; and reflect Hayling Island's heritage within the proposals.

6.1.2 Hayling Island offers a rich cultural, historic and environmental legacy as a leisure destination whose genesis as a pre-Victorian exclusive health resort evolved into mass tourism and the development of the holiday camps and then on to the foundation of a water-sports based offer based around being the world-wide spiritual home of windsurfing. Throughout these key phases of development, the pursuite of health and wellbeing has been a constant golden thread that remains every bit as relevant to the future development and appeal of the seafront as it has always been.

6.1.3 Coastal tourism in the UK remains strong and vibrant, regularly attracting over a third of all domestic holidays and 15% of international visits although visitor expectations have moved on significantly in recent decades. Increasingly, visitors are seeking out high quality experience-led short breaks, staying in unique locations. They are sharing and recommending these experiences via social-media with their families and friends, placing high value on the social capital that accrues and enriching their own lives.

6.1.4 Hayling Island is well placed to capitalise on future leisure trends and build upon a local tourism economy currently worth over £190m a year, supporting around 4,400 local and regional jobs. The seafront features a high-quality natural environment and blue flag beaches together with perfect tidal conditions for a range of water sports activities[1].

6.1.5 However, decades of underinvestment on the seafront has gone hand in hand with changing tastes and has led to an erosion of appeal to traditional markets. In turn this has led to greater dis-connect between the seafront and the self-contained holiday parks who continue to invest and evolve, limiting the flow of visitor spend to wider parts of the island economy. The benefits of visitor spend on the seafront and within the wider Island economy have, in the past, led to investment in the public realm and leisure amenities that local residents have also benefited from. Going forward, this local benefit is in danger of being lost as outdated seafront amenities and attractions become increasingly unviable to maintain.

6.1.6 29.6% of the current local population on Hayling Island is aged over 65 and this figure is expected to increase in the future. The need for accessible leisure facilities to help an aging population stay healthier and fitter for longer has never been greater. So too, the need to attract young working families to help re-dress the population imbalance, bringing new patterns of spend and employment opportunities to sustain the local economy , care for the elderly and contribute to the rising costs of social services.

6.1.7 The recommendations within this report have been developed following extensive online consultation with over 875 residents, visitors and workers. A workshop with key local stakeholders helped to refine the direction of the proposals further.

6.1.8 The development proposals identified for the four key seafront sites are focused on a sustainable

[1] *The Economic Impact of Tourism, Havant in 2016. Tourism South East, 2017*

6. SUMMARY AND RECOMENDATIONS

and appropriately scaled mix of residential to appeal to new families together with leisure amenities and facilities that meet the projected tourism appeal around key growth areas of health and wellbeing, access to nature and water-sports. The leisure elements are primarily focused at West Beach and Eastoke , with a mix of leisure and residential at Beachlands. The Southwood Road site is purely proposed for residential.

6.1.9 The vision for the leisure regeneration of the seafront takes a zonal approach to maximise commercial viability, appeal to different but interconnected leisure markets, and maximise enhancing and preserving the natural beauty of the coastline in between.

At West Beach the vision is to create:

•An activity and experience-based place which takes advantage of the natural qualities of the island. A wild landscape aesthetic with an emphasis on a natural planting scheme.

•A multi-generational, accessible place where people can come together to socialise and become immersed in a natural beach front environment.

•A hub for health and well-being to experience the landscape through activity: walking, cycling, running, water-sports.

•Clear communication of what is on offer which still allows some parts of the Island to feel undiscovered.

•Green links to support the growth & performance of the experience economy and activities available on the beach front sites and around the wider Hayling Island area.

Beachlands will feature:
•Small scale and family-friendly, overnight or short-stay opportunities that overlook the beach front.

•Beautifully designed apartments and housing

•Sea view cafes/ restaurants with an independent focus.

•Landscaping that is an inviting connection to the beach and a destination in its own right.

Eastoke comprises:
•Leisure focused site with a mixture of paid for and free small-scale recreation facilities that are attractive to residents and visitors to Hayling Island.

•Encourage activity at this part of the water front all year round and evening through a relaxed modern beach restaurant that spills onto the sand.

•Good connections to accommodation and housing offers to the West of the beach front.

•A variety of good quality kiosks offering, exciting, modern food and drink options and rental opportunities for cycling, water sports and equipment hire.

•Co-location of leisure and retail to aid the existing retail and cafe's/ restaurants at Eastoke

Connecting between the three sites are proposals to enhance the landscape and encourage walking and cycling through clear, accessible and attractive routes. A new unified suite of street furniture helps to create a sense of place.

At Southwood Road the focus is purely on an appropriately scaled residential development of good-quality family homes and apartments.

The sustainability of the recommendations in this report consider the positive impacts they will have for the local economy, the environment and social inclusiveness. The leisure proposals will help to address

6. SUMMARY AND RECOMENDATIONS

'seasonality' by developing offers that extend the traditional season, helping to put local businesses on a sustainable year-round footing. Concepts of an all-weather commercial leisure attraction are discounted based on a realistic assessment of market potential and viability, however flexible event spaces that will be responsive to changing visitor demands and opportunities in the future are introduced.
Supporting the leisure offer and helping to encourage a higher visitor spend on the seafront are proposals for new and innovative forms of short-term visitor accommodation as well as a high-quality range of food and drink offers.

This report has also undertaken a prudent and high-level viability analysis to demonstrate the proposals are fully deliverable.

The viability considers the build cost and capital land value generation for the residential elements at Beachlands, Eastoke and Southwood/ Creek Road. The assessment features sensitivity analysis around a range of scenarios that include both 30% and 20% of the developments featuring affordable housing. The sensitivity also considers a range of build costs starting with average known local build costs and increasing those by 5, 10, 15 and 20% around assumptions of abnormal build costs. Finally, we have modelled a range of sales values reflecting current uncertainties within the housing market. The residential elements are estimated to generate a residual land value between £7.3 and £8.975m.

It is also recommended that proposals for short term overnight stay beach lodge visitor accommodation on the seafront are constructed and operated by the Local Authority to generate new revenue streams to support the maintenance of seafront infrastructure and other Council services. This model has been successfully introduced recently in other seaside towns and has strong market potential on Hayling Island.

Next steps

Critical to delivering the recommendations in this report will be the phasing of the works. Residential development will inevitably take time to get off the ground and it will be important to build community support for the regeneration by establishing some very nearly wins that deliver positive improvements.

6.2 Recommendations

6.2.1 This study identifies key opportunities to deliver sustainable regeneration of Hayling Island seafront. The next step is to develop a logical and sequenced approach to delivering this vision.

6.2.2 We recommend that:

1. Further community and political engagement takes place to ensure local buy in to the proposals set out in this report and local 'champions' are identified and encouraged to help shape the proposals further.
2. A Programme Delivery Board is set up by Havant Borough Council to oversee delivery. A community Stakeholder Panel could sit along side this, charged with ensuring proposals are commercially and community focused.
3. A sequential Delivery Plan is drawn up, based around achievable timescales, unlocking funding from residential enabling development and access to external grant funding opportunities. Identification and prioritising of achievable 'quick wins' that can deliver significant impact and benefit for the local community will be central to securing local support for the wider programme.
4. Along side these activities, the vision should be developed into a clear branding strategy which can be used to maximise public and commercial investment interest in the regeneration programme.

Phasing should consider firstly introducing small scale but high impact improvements at West Beach to improve access to and enjoyment of the seafront.

6. SUMMARY AND RECOMENDATIONS

These might centre around commercial development of overnight stay beach lodges which, in turn, will generate a revenue return to fund initial public realm improvements. These will also help to develop the visitor offer and future branding of the seafront and could be developed quite quickly on land that is already owned by the Council. In addition we propose that an upgrading of the café building and the offer will demonstrate positive change and create momentum An events programme around water sport could then follow on.

Concurrent with this, the development of residential proposals for Southwood Road could commence. The site lies within Council ownership and design proposals could be developed with a view to seeking planning approvals and marketing the site.

We would recommend following up with the Beachlands site. The Council would need to work closely with the owner of the Funland site to undertake appropriate development in line with the proposals set out in this report.

A separate feasibility study has been undertaken by Savills to test the high-level viability of the urban design proposals within this report. This viability assessment has demonstrated that the proposals are deliverable and would generate a positive capital return which could be reinvested into the proposed leisure provision. A prudent approach to the viability has been taken, based on the likelihood of higher than normal build costs and potential sales values for the residential elements based on a prudent assessment of current and likely market values. The viability also considers a phased approach to delivery.

6.2.3 The proposals in this report have been subject to an independent viability study by Savills. The viability assessment calculated the residual land value after gross development vale less all applicable costs are taken into account. The residential proposals combined are shown to generate a positive residual value which could then be used to contribute funding for the leisure elements of the proposals. Various options around affordable housing contribution have been modelled within the viability. The assessment has also assumed build costs may be higher than normal due to the coastal location and proximity to the flood-plain and a prudent approach has been taken to valuation of any new builds, reflecting current market conditions.

6.2.4 These proposals have also been subject to appraisal to evaluate their impacts on the current environmental, economic and social characteristics of the area. The options subjected to this assessment included the design proposals in this report; an option that considered maintenance and minimal investment in the current facilities (maintaining the status quo); and a 'do nothing' option which assumed the new Local Plan was not adopted. The recommended option to deliver the design proposals in this report demonstrate they would have a positive impacts for the local environment, economy and social aspects.

7. APPENDICES

APPENDIX A)

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APPENDIX A) BIBLIOGRAPHY

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APPENDIX B) CONSUMER DEMOGRAPHIC PROFILE

APPENDIX C) CONSUMER DEMOGRAPHIC PROFILE

acorn Consumer Demographic Profile

For Drivetime Catchments from South Hayling

Compared to the South East Region and UK Base

savills

CACI

Source: CACI 2018
Produced by Savills Commercial Research 2018

acorn Consumer Demographic Profile

For Drivetime Catchments from South Hayling

Compared to the South East Region and UK Base

savills

CACI

Source: CACI 2018
Produced by Savills Commercial Research 2018

ACORN Type By Affluence & Lifestage Categories

			30 minute		60 minute		South East	UK
			Count	%	Count	%	%	%
Affluent Achievers	Lavish Lifestyles	Exclusive enclaves	0	0.00%	238	0.04%	0.20%	0.08%
		Metropolitan money	0	0.00%	44	0.01%	0.03%	0.15%
		Large house luxury	402	0.23%	4,528	0.76%	2.05%	0.87%
	Executive Wealth	Asset rich families	7,690	4.44%	27,535	4.61%	4.26%	2.34%
		Wealthy countryside commuters	1,901	1.10%	19,340	3.24%	4.31%	2.28%
		Financially comfortable families	2,575	1.49%	12,643	2.12%	2.31%	2.16%
		Affluent professionals	348	0.20%	1,736	0.29%	0.95%	0.86%
		Prosperous suburban families	1,597	0.92%	5,196	0.87%	2.14%	1.52%
		Well-off edge of towners	2,244	1.29%	14,296	2.39%	3.09%	1.68%
	Mature Money	Better-off villagers	4,589	2.65%	21,786	3.65%	5.06%	2.78%
		Settled suburbia, older people	5,271	3.04%	13,664	2.29%	2.41%	2.98%
		Retired and empty nesters	5,086	2.93%	19,259	3.22%	2.63%	2.49%
		Upmarket downsizers	2,689	1.55%	11,732	1.96%	1.83%	1.27%
Rising Prosperity	City Sophisticates	Townhouse cosmopolitans	257	0.15%	602	0.10%	0.38%	0.72%
		Younger professionals in smaller flats	175	0.10%	247	0.04%	0.10%	1.31%
		Metropolitan professionals	0	0.00%	0	0.00%	0.01%	0.79%
		Socialising young renters	427	0.25%	1,337	0.22%	0.87%	1.03%
	Career Climbers	Career driven young families	2,691	1.55%	15,492	2.59%	3.85%	1.90%
		First time buyers in small, modern homes	2,878	1.66%	26,531	4.44%	5.99%	3.16%
		Mixed metropolitan areas	406	0.23%	2,160	0.36%	0.34%	1.08%
Comfortable Communities	Countryside Communities	Farms and cottages	67	0.04%	747	0.13%	0.20%	1.46%
		Larger families in rural areas	267	0.15%	1,031	0.17%	0.35%	1.62%
		Owner occupiers in small towns and villages	2,090	1.21%	7,493	1.25%	1.57%	3.17%
	Successful Suburbs	Comfortably-off families in modern housing	5,830	3.36%	22,322	3.74%	2.59%	3.30%
		Larger family homes, multi-ethnic areas	15	0.01%	532	0.09%	0.48%	0.85%
		Semi-professional families, owner occupied neighbourhoods	5,780	3.33%	25,341	4.24%	4.17%	2.37%
	Steady Neighbourhoods	Suburban semis, conventional attitudes	3,976	2.29%	14,735	2.47%	1.70%	3.48%
		Owner occupied terraces, average income	14,494	8.36%	20,737	3.47%	2.15%	1.59%
		Established suburbs, older families	4,950	2.86%	18,685	3.13%	4.24%	2.36%
	Comfortable Seniors	Older people, neat and tidy neighbourhoods	4,770	2.75%	17,231	2.89%	2.31%	1.48%
		Older people, neat and tidy neighbourhoods	1,923	1.11%	6,836	1.14%	1.07%	0.51%
	Starting Out	Educated families in terraces, young children	9,045	5.22%	20,445	3.42%	2.91%	2.03%
		Smaller houses and starter homes	2,503	1.44%	14,520	2.43%	2.48%	2.13%
Financially Stretched	Student Life	Student flats and halls of residence	602	0.35%	3,911	0.65%	0.19%	0.31%
		Term-time terraces	2,854	1.65%	4,981	0.83%	0.31%	0.27%
		Educated young people in flats and tenements	2,881	1.66%	11,666	1.95%	0.91%	1.59%
	Modest Means	Low cost flats in suburban areas	2,516	1.45%	11,807	1.98%	1.58%	1.21%
		Semi-skilled workers in traditional neighbourhoods	2,895	1.67%	9,767	1.63%	1.41%	2.75%
		Fading owner occupied terraces	3,626	2.09%	12,610	2.11%	1.64%	2.80%
		High occupancy terraces, many Asian families	0	0.00%	1,133	0.19%	0.19%	1.02%
	Striving Families	Labouring semi-rural estates	1,543	0.89%	11,408	1.91%	2.92%	1.61%
		Struggling young families in post-war terraces	7,973	4.60%	21,540	3.61%	3.55%	1.65%
		Families in right-to-buy estates	2,415	1.39%	10,053	1.68%	1.46%	2.12%
		Post-war estates, limited means	3,161	1.82%	6,700	1.12%	0.73%	2.30%
	Poorer Pensioners	Pensioners in social housing, semis and terraces	772	0.45%	3,402	0.57%	0.65%	0.91%
		Elderly people in social rented flats	3,198	1.84%	10,887	1.82%	1.24%	1.10%
		Low income older people in smaller semis	1,445	0.83%	4,730	0.79%	0.90%	2.29%
		Pensioners and singles in social rented flats	2,002	1.15%	6,355	1.06%	0.97%	1.55%
Urban Adversity	Young Hardship	Young families in low cost private flats	4,159	2.40%	17,436	2.92%	2.58%	2.08%
		Struggling younger people in mixed tenure	3,952	2.28%	12,867	2.15%	1.61%	1.75%
		Young people in small, low cost terraces	8,060	4.65%	10,591	1.77%	1.05%	2.33%
	Struggling Estates	Poorer families, many children, terraced housing	1,582	0.91%	5,758	0.96%	0.93%	1.76%
		Low income terraces	1,640	0.95%	1,984	0.33%	0.19%	0.96%
		Multi-ethnic, purpose-built estates	12	0.01%	56	0.01%	0.03%	1.22%
		Deprived and ethnically diverse in flats	1,198	0.69%	1,648	0.28%	0.09%	0.87%
		Low income large families in social rented semis	2,046	1.18%	7,255	1.21%	1.35%	1.80%
	Difficult Circumstances	Social rented flats, families and single parents	6,358	3.67%	16,900	2.83%	2.20%	1.48%
		Singles and young families, some receiving benefits	1,978	1.14%	5,324	0.89%	0.71%	1.96%
		Deprived areas and high-rise flats	7,501	4.33%	17,229	2.88%	1.50%	2.04%
	Not Private Households	Active Communal Population	17	0.01%	136	0.02%	0.04%	0.03%
		Inactive Communal Population	54	0.03%	200	0.03%	0.03%	0.03%
		Business areas without resident population	0	0.00%	0	0.00%	0.00%	0.00%
	TOTAL		173,376		597,375			

APPENDIX C) ONLINE DIGITAL SURVEY REPORT

APPENDIX C) ONLINE DIGITAL SURVEY REPORT

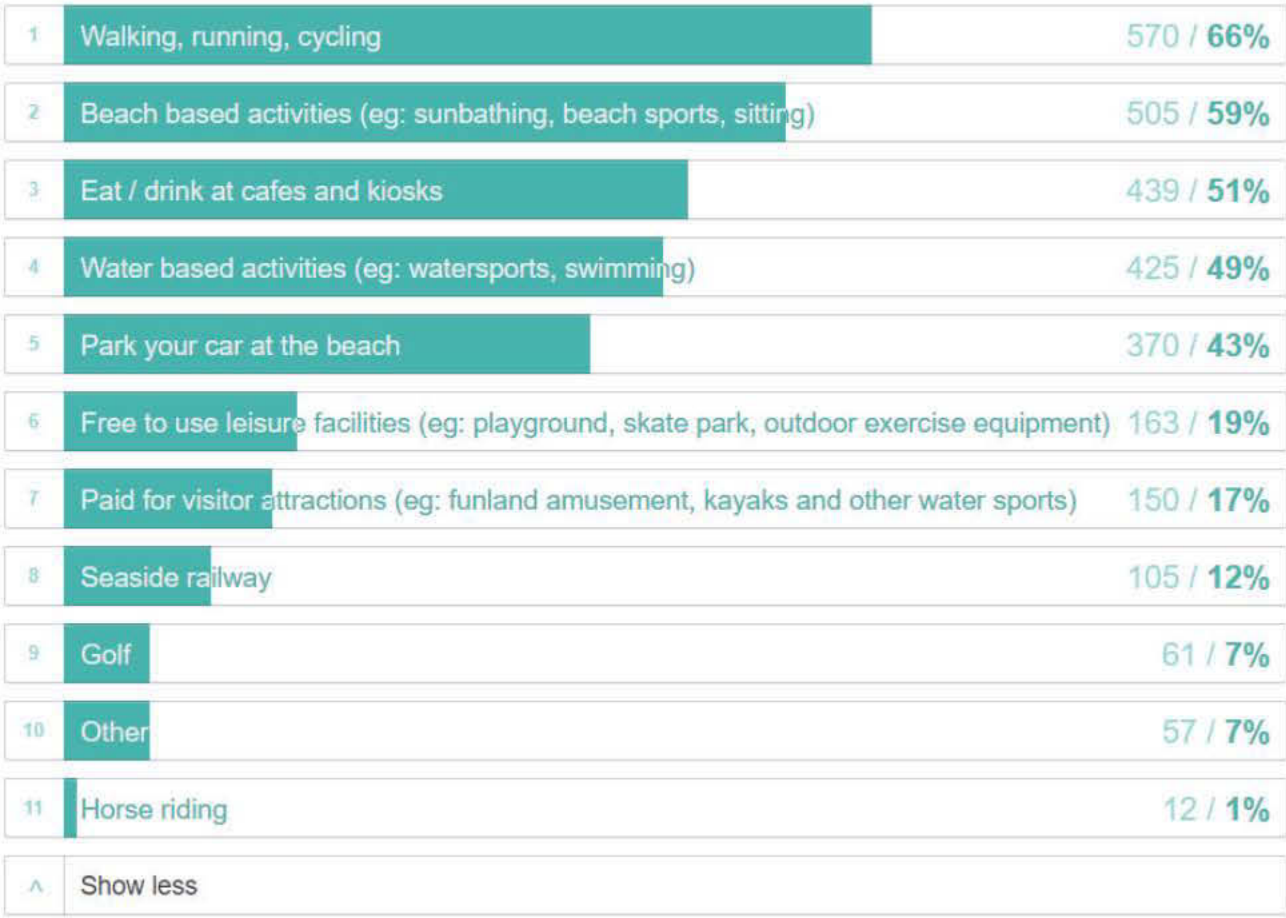
What is your relationship with Hayling Island?

853 out of 871 people answered this question

APPENDIX C) ONLINE DIGITAL SURVEY REPORT

Thinking about the last time you visited the seafront at Hayling Island, tell us what activities you took part in?

860 out of 871 people answered this question



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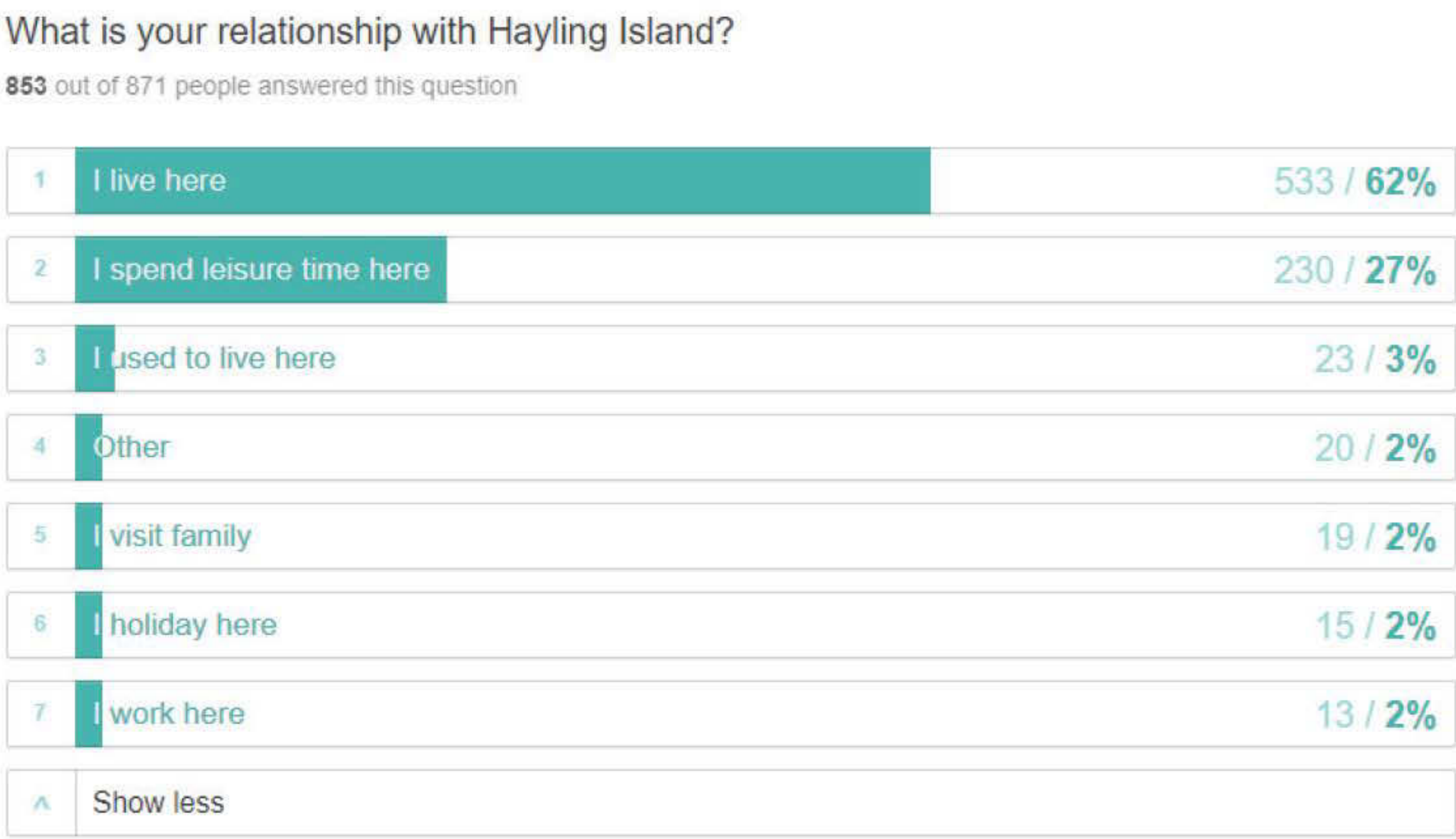


APPENDIX C) ONLINE DIGITAL SURVEY REPORT

What do you feel would attract new visitors to Hayling seafront and encourage them to stay longer and spend more money?

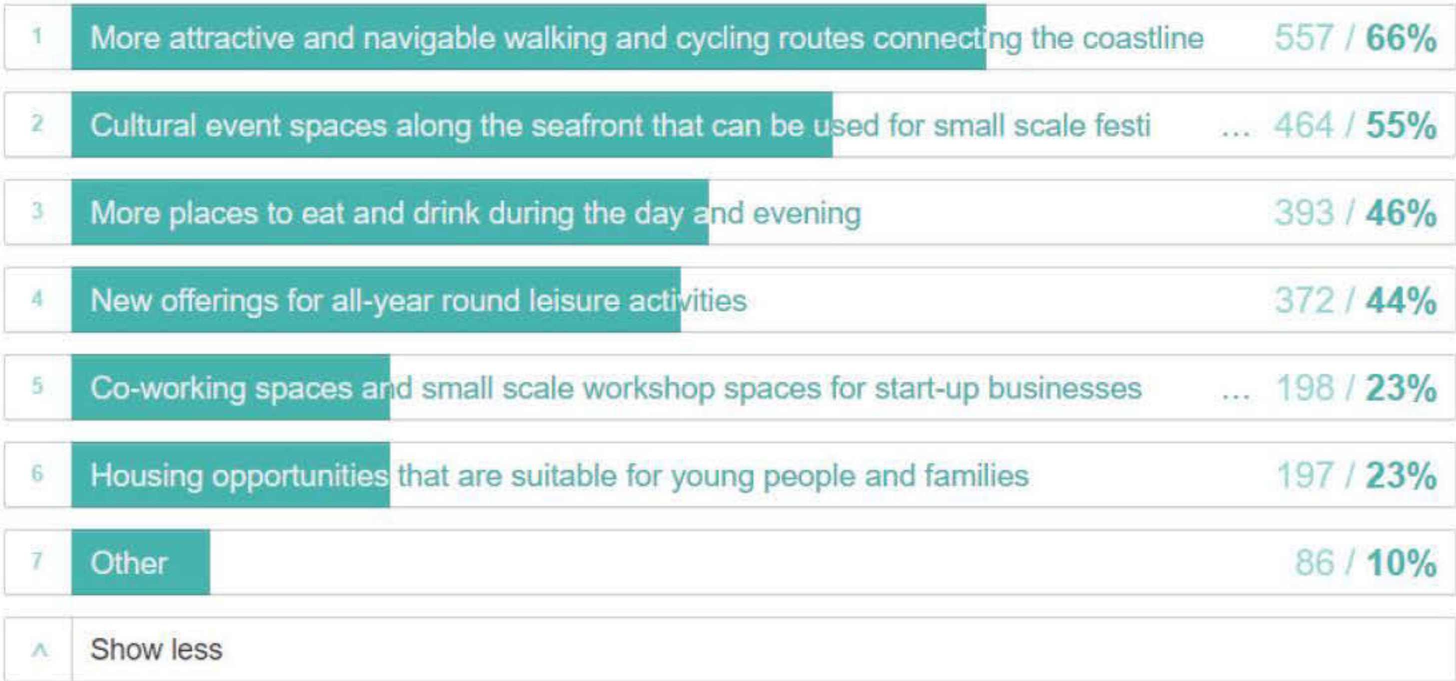
851 out of 871 people answered this question

1	More attractive and navigable walking and cycling routes	520 / **61%**
2	More modern places to eat and drink	409 / **48%**
3	Easier access to the seafront through improved public transport links	390 / **46%**
4	More leisure options for children and young people	389 / **46%**
5	More leisure options for adults	345 / **41%**
6	Extending the visitor season through all-weather facilities	330 / **39%**
7	Vibrant and sociable spaces to shop	296 / **35%**
8	A wider variety of cultural and sporting events	256 / **30%**
9	Better information/ marketing / branding of what is currently on offer	231 / **27%**
10	Other	25 / **3%**
11	choice 10	3 / **0%**
12	Contemporary, eco-friendly overnight stay beach huts for short term hire	1 / **0%**
^	Show less	

APPENDIX C) ONLINE DIGITAL SURVEY REPORT

There is a significantly large population of over 65s living in Hayling Island compared with the rest of the borough. What types of offerings would you like to see that will meet the needs of its existing residents whilst also encouraging a younger population to live and work on the island?

848 out of 871 people answered this question



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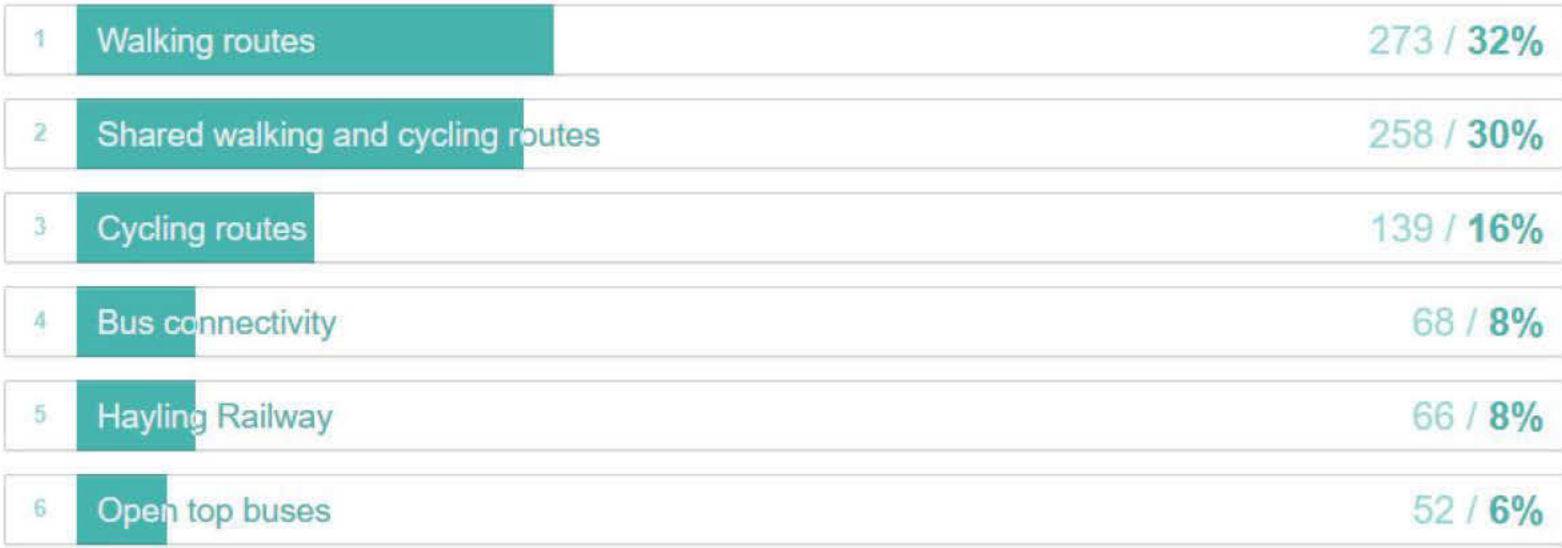
10	Other	25 / **3%**
11	choice 10	3 / **0%**
12	Contemporary, eco-friendly overnight stay beach huts for short term hire	1 / **0%**
^	Show less	

APPENDIX C) ONLINE DIGITAL SURVEY REPORT

What do you consider would be the best way to get around the seafront once you've arrived?

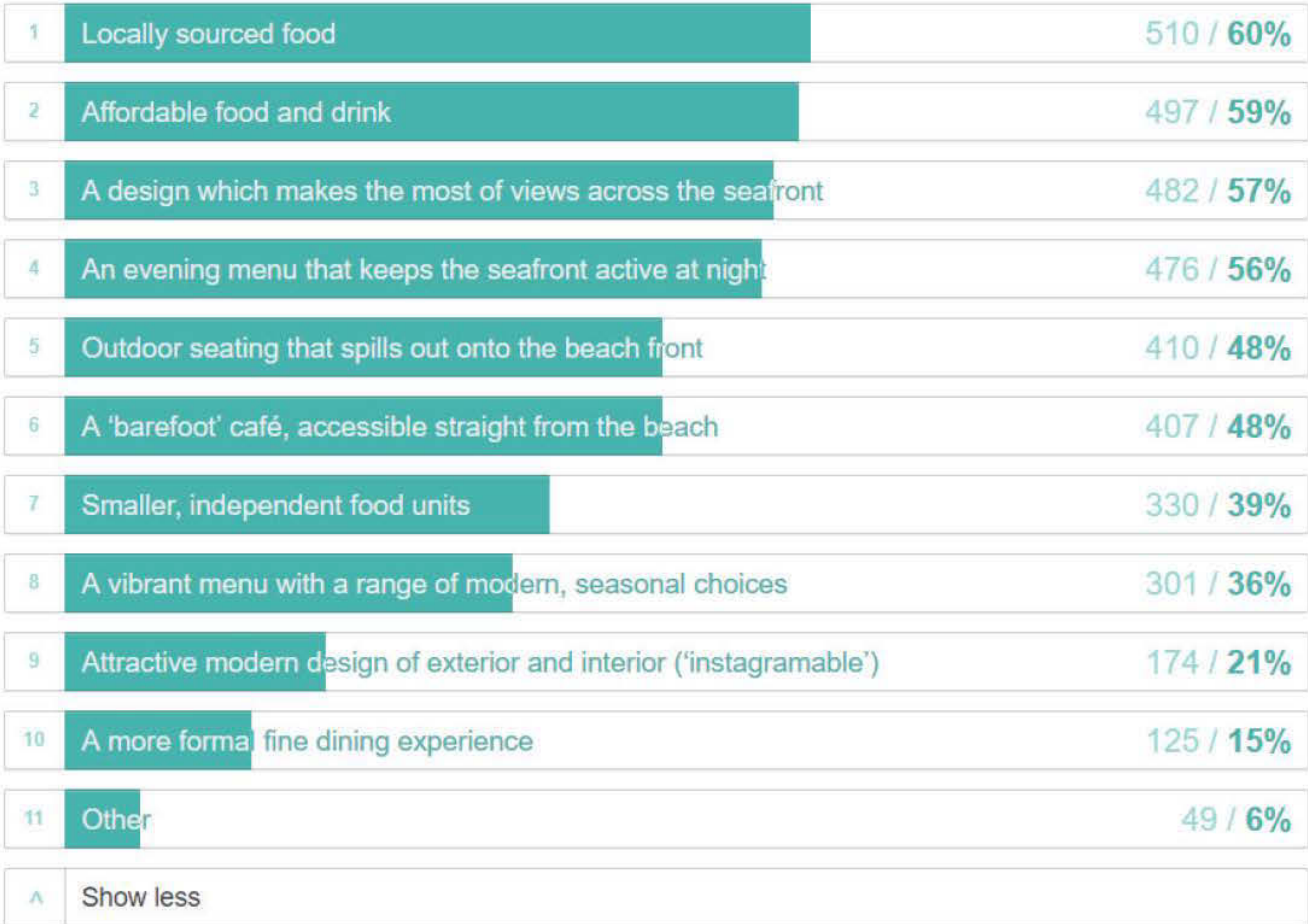
856 out of 871 people answered this question



APPENDIX C) ONLINE DIGITAL SURVEY REPORT

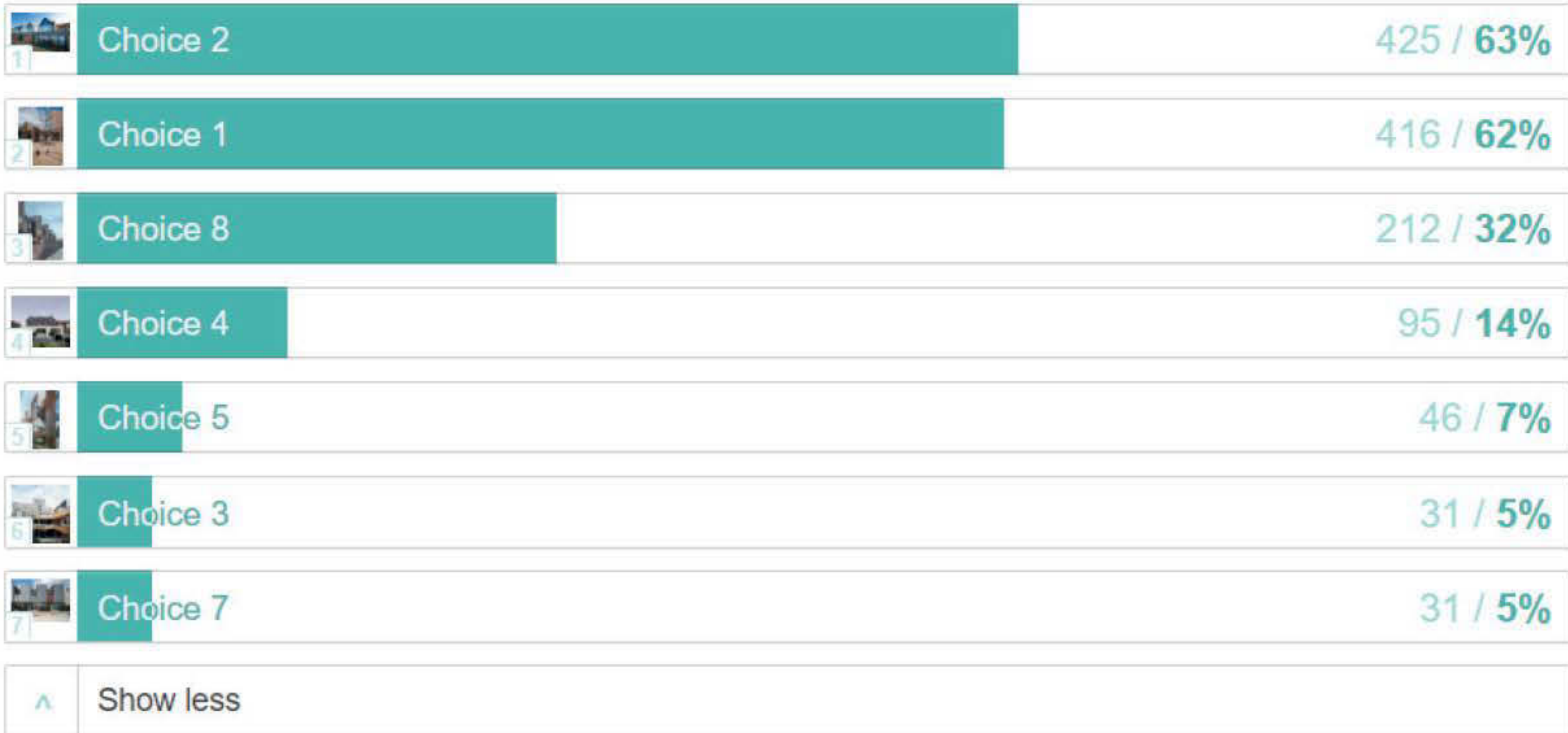
What food / drink opportunities do you think the seafront should have?

847 out of 871 people answered this question



The Seafront could provide opportunities for design led regeneration including new homes, injecting "beauty" into the existing housing offer.

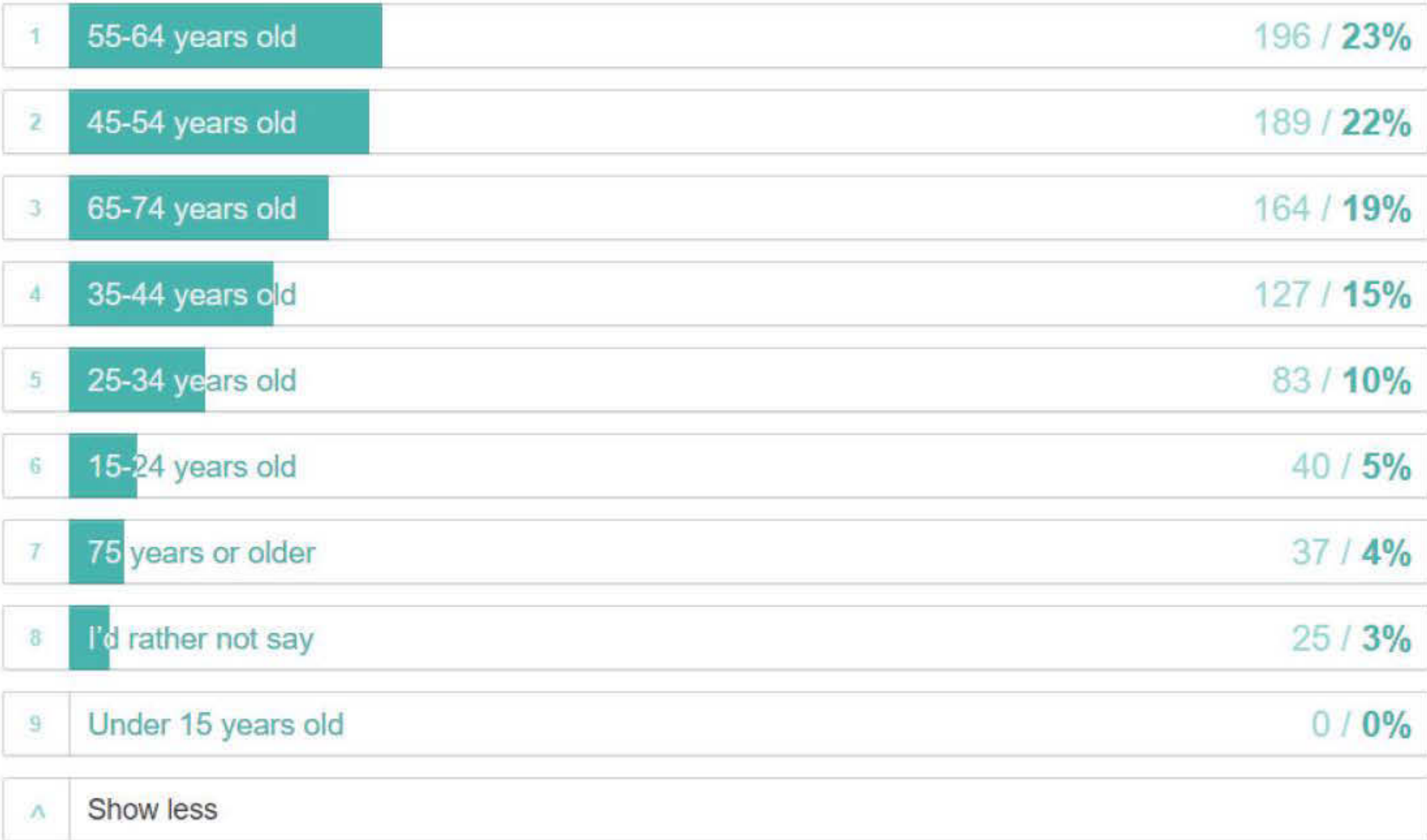
672 out of 871 people answered this question



APPENDIX C) ONLINE DIGITAL SURVEY REPORT

Which age group are you in?

861 out of 871 people answered this question



APPENDIX C) ONLINE DIGITAL SURVEY REPORT

Please click the images that you think are suitable, if funding allows, for Hayling Island Seafront

835 out of 871 people answered this question

1	Indoor / outdoor street food 'court'	480 / 57%
2	Bike hire facilities	419 / 50%
3	Public BBQ and eating spaces	359 / 43%
4	Street furniture and sheltered seating that encourages both sociability and qui ...	341 / 41%
5	Inclusive / all ability play equipment	316 / 38%
	Show less	
6	Dancing water fountains	304 / 36%
7	Outdoor amphitheatre for staging cultural events	279 / 33%
8	Challenging play/ Adventure playgrounds	273 / 33%
9	Kiosk retail opportunity for small-scale businesses	256 / 31%
10	Pocket parks linking up parts of the seafront through play	246 / 29%
11	A wayfinding strategy that opens up the site and connects different points alo ...	245 / 29%
12	Playful seating integrated into the landscape	234 / 28%
13	Interactive sculpture / art	204 / 24%
14	Architecturally interesting lookout platform, accessible to the public	200 / 24%
15	Skate-able landscaping	179 / 21%
16	Outdoor table tennis	162 / 19%
17	Other	120 / 14%
	Show less	

APPENDIX D) BASELINE ASSESSMENT

APPENDIX D) BASELINE ASSESSMENT

1.1 Setting the scene

1.1.1 Historical development of tourism on Hayling Island

Hayling Island traces its name back to Saxon times, referring to the Island of Hegel's people. During the middle ages it established a significant population but remained a relatively undeveloped and isolated island community.

1.1.2 From the mid 18th century onwards, the 'discovery' of the health giving properties of seawater bathing and breathing ozone led to the speculative promotion of new seaside spa resorts across the country. Hayling Island first attracted the attention of developers in the early 19th century with Sir Richard Hotham proposing to convert the island into a resort to rival others on the south coast. A key stumbling block to development was the limited tidal access to the island. Following an Act of Parliament, a wooden toll bridge was established in 1824 to connect the island to the mainland.

1.1.3 The Royal Hotel was built on the seafront in 1825 to cater for the new breed of wealthy holiday makers, together with a nearby Bath House offering hot, tepid and cold baths. Bathing machines were also provided and by 1909 the seafront featured beach huts and bathing tents.

1.1.4 Fueling the growth in tourism popularity was the railway line connecting the mainland to the island in 1865 and extended to South Hayling in 1867.

1.1.5 By the early 1900s former farming land around the east end of the island was being snapped up to build holiday homes. In the early days, old railway carriages would be converted for holiday use. In 1931 Captain Harry Warner established the first holiday camp at Northney and by 1935 a number of new holiday home estates such as Sandy Beach and Sea Front Estate had been built and Hayling Island was being actively marketed as a popular holiday destination for the working population. This was facilitated by good railway access to London and the development of the 'package holiday' offering accommodation, food, entertainment and leisure at the various holiday camps.

APPENDIX D) BASELINE ASSESSMENT

1.1.6 Following a brief hiatus during the Second World War, the holiday camps flourished in the 1950s and provided significant employment for the island population. During this period the population of the island was known to double in the summer months as result of tourist activity.

1.1.7 The island is regarded as the birthplace of windsurfing after local resident, Peter Chilvers, invented the first windsurf board in 1958. The water sports provision has contributed to the tourist economy in recent decades, adding a new dimension to the offer.

1.1.8 However, from the early 1960s onwards, domestic tourism across the UK underwent significant change with the opening up of cheap international air travel, rising wages and the prospect of guaranteed sun. This led to a significant decline in the popularity of domestic seaside resorts and a protracted period of underinvestment in infrastructure and facilities, leading to further decline.

1.1.9 Hayling Island saw a protracted period of consolidation and the eventual closure of many of the holiday camps, particularly in the 1980s. Early efforts were made to address infrastructure challenges such as the 1956 replacement of the wooden toll bridge onto the island by the present-day road bridge. However, the rise of car ownership saw a massive decline in use of the railway which, for Hayling, meant closure of the Hayling Billy rail line in 1963.

1.1.10 A consolidated group of holiday camps continue to thrive today, with two of them: Sinah Warren and Warner Lakeside, having reinvented themselves into modern hotel resorts. Mill Rythe has also updated its traditional holiday camp offer to appeal to a modern audience.

1.1.11 Hayling Island's prominence as a traditional seaside resort has declined in recent decades with the population only increasing by 20-25% in the summer months by the turn of the millennium. Much of the seafront infrastructure is now dated and has suffered from long term lack of investment although there is evidence of recent investment by the private sector within the camps and hotel resorts demonstrating the island retains significant niche appeal to modern holiday makers.

APPENDIX D) BASELINE ASSESSMENT

1.1.12 This report will show the seafront has retained a number of fundamental qualities that, with a sensitive and targeted approach to investment, could regenerate and improve the tourism economy and encourage further commercial investment and job creation.

1.1.13 Chiefly, the seafront has retained a high-quality natural environment. It has been awarded the Blue Flag Award for the last 26 consecutive years. The award is an international benchmark which recognises clean and safe stretches of coastline that promote environmental education and offer excellent visitor facilities.

1.1.14 Despite the national and local decline of domestic staying tourism, a strong maritime employment base and day visitor economy has still been maintained on the island. The Mengham District Centre provides a modest but successful retail hub. However, other employment opportunities on the island are limited and the vast majority of working residents commute off the island to work.

1.1.15 A significant proportion of Hayling Island seafront is considered to be at risk from coastal flooding. This presents challenges in balancing flood risk management and safeguarding the island's protected habitats as well as existing residential properties and tourist facilities. Recent decades have seen the loss of beach sand due to coastal processes and the abandonment of unsustainable coastal defenses towards the western end of the seafront. Coastal erosion and projected sea level rises will continue to shape the character of the seafront in decades to come. Regeneration proposals for the seafront need to be flexible to future changes to the coastline.

1.1.16 Access onto the island and concerns around traffic flows during peak summer also remain a significant challenge to be addressed and this report on tourism will consider how growth can be achieved sustainability, minimising impacts for residents.

APPENDIX D) THE COASTAL TOURISM ECONOMY IN 2018

1.2 National picture

1.2.1 Across England, 36% of all domestic holidays are to the coast, which is far more popular than city and countryside locations. Overnight and day trip spend at the coast tops £8 billion a year. 15% of all international visitors to the UK include a trip to the coast. Coastal tourism directly supports around 210,000 jobs, which is roughly similar in employment terms to the telecoms sector[1].

1.2.2 Occupancy rates are high and visitors to the seaside have the highest levels of satisfaction and customer retention of any domestic trip type.

1.2.3 England's coastal visitor economy is growing but it has a significant unrealised potential, with growth in employment and visitor numbers below national averages for the visitor economy[1].

1.2.4 Some relevant plans and strategies in competing locations along the coast from Southampton to Worthing include:

- New Andrew Simpson Water sports Centre in Portsmouth
- Redevelopment of marina and waterfront at Gosport, including Haslar Marina
- Redevelopment of Mercury Yacht Harbour and the adjoining Riverside Camping in Eastleigh.
- East and west bank redevelopment of Littlehampton harbour
- New water sports venue set to open on Littlehampton seafront, offer kite surfing and stand-up paddle boarding lessons.
- Proposals for a winter garden at Bognor Regis, incorporating a new theatre, a rolling cultural programme, restaurants and new hotel
- New lagoon proposed at Worthing for water sports, swimming and boat moorings (at 'vision' stage).

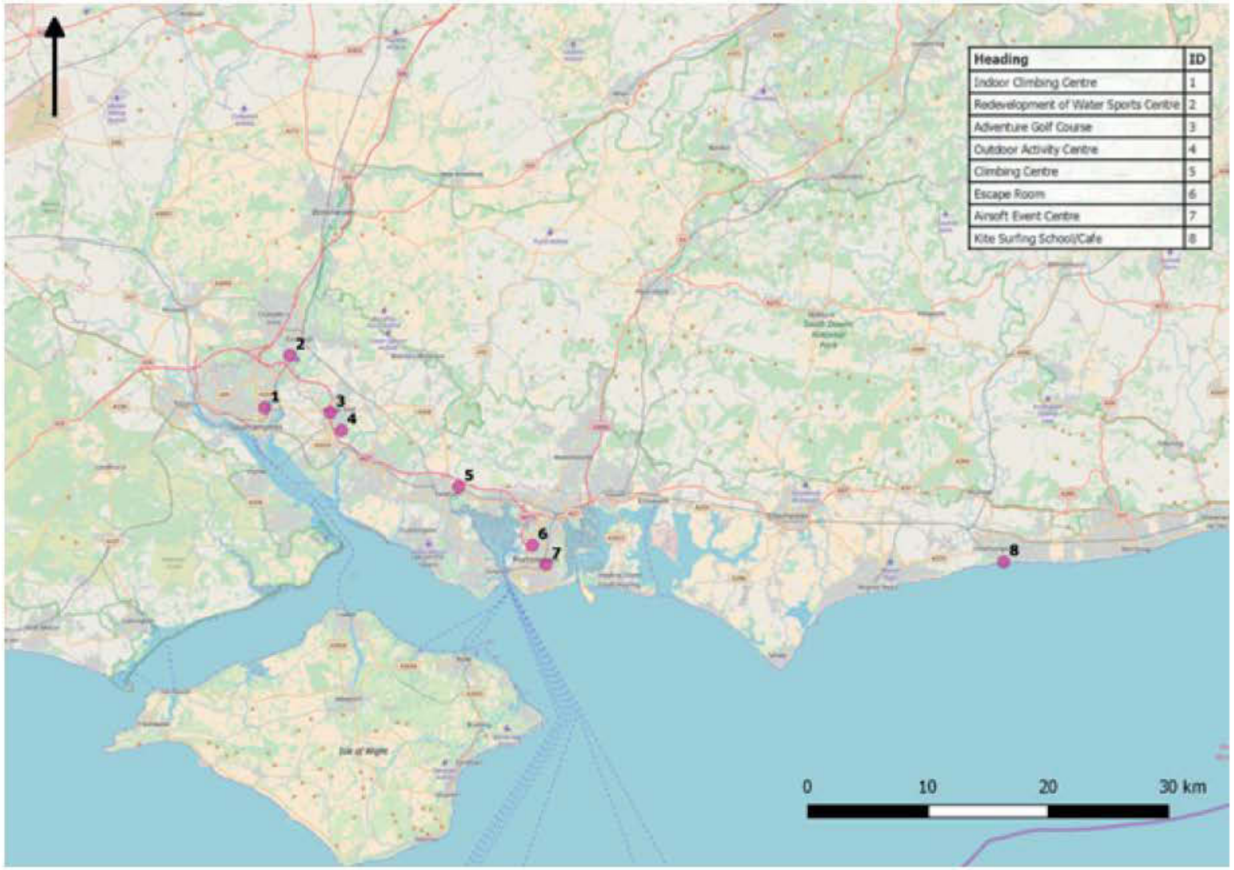


Figure 1.1 Source: Glenigan, accessed Sept 2018

Figure 1.1 sets out extant planning permissions for selected sports and leisure developments across the same stretch of the south coast around Hayling Island. Notable proposals are for a new adventure golf course in Southampton, a new 'escape room' experience in Portsmouth and the conversion of Kingston prison to a new airsoft events centre.

1.2.5 Research into coastal visits and experiences consistently reveals a set of core values that visitors cherish[1]. These are:

- Fun
- Active

[1] *Coastal Visitor Economy: Vision, Strategy and Action Plan. NCTA 2017*

APPENDIX D) THE COASTAL TOURISM ECONOMY IN 2018

- British experience
- Nostalgia
- Escape and relax
- Quality time

1.2.6 However, coastal tourism faces a number of challenges across the UK[4]:

- Growth in tourism employment is lower at the coast than for inland destinations.
- Coastal tourism businesses face staffing challenges relating to recruitment and retention.
- While the coast is considered by many to be a national treasure, visiting the coast is not a high priority primarily due to lack of awareness of what is available and on offer.
- Perceptions of non-visitors remain less than positive, with many perceiving coastal resorts as 'tacky and dated.'
- Seasonality and a cycle of boom and bust remains a consistent challenge for all coastal destinations and has remained largely unchanged since 2008.

1.2.7 The key UK coastal holiday trends in 2018 include[5]:

- Nostalgia: Childhood holidays influence our decisions on when to visit in later life. The National Coastal Tourism Academy (NCTA) reported that out of a representative survey of 1000 adults who visited the coast 56% said their recent visit was influenced by an earlier childhood visit, compared to 44% for visits to inland destinations.
- Coastal holidays have a more positive impact on relationships than UK holidays in general. 78% in the survey agreed that visits to the coast helped to reduce stress levels, compared to only 72% for inland destinations. 85% agreed coastal holidays improved their general wellbeing, compared to 78% for inland destinations.
- Coastal holidays were less subject to change than other UK holidays with 16% who took a coastal break considered going overseas instead, compared to 24% for UK holidays in general.

1.2.8 The top five motivations for UK residents going on holiday[6]:

- Overseas holiday: 51% climate and weather; 42% overall price of holiday; 37% safe place to visit; 31% scenery and landscape; 31% been before
- UK destinations as a whole: 35% scenery and landscape; 34% overall price; 34% preferred transport option; 31% distance/time from destination; 30% safe place to visit
- English coastal destination: 73% beaches; 40% scenery and landscape; 40% overall price of holiday; 36% distance/ time from destination; 36% easy to get to.

1.2.9 *Insight: Hayling Island remains well positioned to appeal to today's domestic stay and day visitor market with its high quality natural environment and beaches, range of affordable holiday accommodation and proximity to significant catchment audience.*

[4] Coastal Visitor Economy: Vision, Strategy and Action Plan. NCTA 2017

[5] *Holiday Trends. BDRC supplementary report commissioned by the National Coastal Tourism Academy 2018*

[6] *Holiday Trends. BDRC supplementary report commissioned by NCTA 2018*

APPENDIX D) THE COASTAL TOURISM ECONOMY IN 2018

2.3 Regional picture

2.3.1 A study into the economic impact of tourism in Havant was produced by Tourism South East for 2016, the most recent year for which data is currently published. This identifies the number of domestic overnight trips within the South East region increased by 8% between 2015 and 2016, while the total value of visitor spend by holiday makers and day trippers increased by 10% in the same period to £13,628,000.

2.3.2 Hampshire contains three of the principal international gateways to the UK, all within short distance of Hayling Island: Southampton Airport and Southampton and Portsmouth harbours. The airport is the busiest in south central England, providing flights across the UK, continental Europe and the Channel Islands. Portsmouth is the UK's second busiest ferry port, handling 2.3m passengers a year while Southampton port is the busiest passenger cruise port in the UK.

2.3.3 There has been significant growth in leisure and accommodation provision within the Portsmouth and Southampton conurbations in recent years, clustered particularly around Gunwarf Quay and West Quay areas. This presents both a challenge and an opportunity for Hayling Island. A challenge in the sense that it cannot compete with an increasingly diverse and high-quality all-weather leisure option on its doorstep but it can develop appeal based on its natural beauty and relatively undeveloped landscape in contrast to the highly urbanised areas within short distance. Key to success will be how Hayling Island seafront differentiates itself from Southsea seafront, which is currently easier to get to from the local main urban centres.

2.3.4 As part of this study, a wide-ranging online survey sought to capture the views of local residents, visitors, people who work on the island and former residents. Over 850 people responded to the survey which took place between 21st August - 1st October 2018. Respondents were clustered around 1 hour drive time, including Portsmouth, Southampton and Havant and following the M3 corridor from Winchester, Basingstoke to London. With the growth in popularity in outdoor leisure activities, investment in formal and informal facilities to support an expanding range of leisure pursuits on Hayling Island seafront could act as a catalyst for economic growth and support the rebranding of the overall leisure offer, drawing in a higher spending target audience.

LINK TO ONLINE MAP HERE

2.3.5 This area includes significant urban populations. The total population within a nominal 30 minutes drive time is around 1,063,831, presenting a significant local market for day visitor tourism on Hayling Island.

2.3.6 Appendix C presents a profile of the resident population within a 30 minute and 60 minute drivetime of South Hayling. The profile classifies residents according to the 'Acorn' system developed by CACI. This system analyses social factors and population behaviour to segments households into 6 categories, 18 groups and 62 types. It shows that:

• The predominant population group within both a 30 and 60 minute drive time is 'comfortable communities'. The largest segment within this category in the 30 minute catchment are 'owner occupied terraces, average income'. Within 60 minutes it is 'semi-professional families, owner occupied neighbourhoods'.

• The profile appears more wealthy when accounting for the larger catchment: Within 30 minutes the next largest group are those in 'urban adversity', whereas within a 60 minute drivetime the next largest group are 'affluent achievers'. Within urban adversity the largest segment is 'young people in small, low cost terraces', whereas within affluent achievers the largest segment is 'asset rich families'.

APPENDIX D) THE COASTAL TOURISM ECONOMY IN 2018

2.4 Local picture

2.4.1 Comparative review of studies into the economic impacts of tourism within the Borough of Havant between 2007 and 2016 reveal that the total number of staying visitors and staying visitor spend has stabilised when inflation is factored[1]. Day visitor numbers have increased along with day visitor spend, which is in line with national trends as people continue to enjoy more frequent leisure trips and shorter staying trips taken more often.

2.4.2 *Insight: An expanding day visitor market puts significant pressure on transport infrastructure linking Hayling Island with the mainland. Future development of this market could look to improve sustainable transport options including: mainland park and ride, ferry & public transport connections and development of year-round all-weather cycling routes / cycle hire connections. A key emphasis will be on attracting a higher spending demographic from the semi-professional families that live within 1-hour drive (see Appendix B). Fewer visitors, spending more, will help to support sustainability around transport and congestion issues as well as improve productivity and profitability for local tourism-based businesses.*

Volume and Value of Tourism, Havant Borough (unadjusted for inflation)
Source: Tourism LDF Background Paper No 22: Havant Borough Council, 2007
The Economic Impact of Tourism, Havant in 2016. Tourism South East, 2017

	2007	2016
Total staying visitor trips	350,000	356,000
Total staying visitor spend	£54m	£68.4m
Total number of day visits	1.9m	2.2m
Total day visitor spend	£62m	£94m
Total direct & indirect visitor spend within the borough inc. visits to friends & family and second homes	£161m	£190m
Total number of actual jobs supported by tourism activities within the Borough	3,400	4,400

[1] *Tourism LDF Background Paper No 22: Havant Borough Council, 2007 and The Economic Impact of Tourism, Havant in 2016. Tourism South East, 2017*

2.5 The current seafront visitor offer

2.5.1 Hayling Island has 3 miles of beaches which each hold Blue Flag Seaside Award flags for cleanliness and management.

2.5.2 The beach is primarily shingle above high tide mark with long stretches of sand below the line. The seafront offers clear views of the Solent and Isle of Wight. At low tides the waters are shallow and the West Winner sand bank provides shelter larger waves and a lagoon effect. Because of this, the water in the West Beach area is considered warmer than other parts of the seafront. Conditions make the sea highly favourable for water sport activities and swimming. While the sand bar proves popular with walkers and horse riders at low tide. Amenities include a par 3 golf course; Hayling Golf Club, which positions itself as one of the top 100 courses in England; Inn of the Beach restaurant; beach huts; seasonal kiosk; ample car parking and public toilets. West Beach also provides access onto a sand dune landscape with high quality environmental value and some historical features. A network of informal paths lead towards the Beachlands area.

2.5.3 Beachlands provides the main access gateway onto the seafront and features the tourist / beach office, funfair, food outlets amusements and site for weekly car boot fair. Public toilets and car parking together with the start of the beach railway are to be found here. Moving further east, Eastoke beach is a steep shingle, groyned beach which features the start of a promenade that runs through to the nature reserve and sailing club at Sandy Point. Facilities include car parking, toilets, beach railway, outdoor gym and playground and easy access to shops.

2.5.4 A wide range of activities can be witnessed across the seafront, including fishing, cycling, golf, horse riding, skateboarding, fitness activities, walking and beach hut relaxing. Out in the water, jet ski, kayak, kitesurfing, sailing, swimming, paddle boarding, surfing, wind surfing, water-skiing and wake-boarding take place. Many of these activities take place in an informal way with little in the way of marketed pay and play visitor experiences.

2.5.5 In recent years, camper-van overnight stays at West Beach have proved popular but these have recently been discontinued temporarily (experimental 18 month order started 10th August 2018) due to concerns around safety.

2.6 Events calendar

3.6.1 The seafront currently offers a limited calendar of events, the most significant being the annual Kitesurfing Armada event in June. The three day event features kite surf competitions and demonstrations, camping, music, retailing, food and drink, family and schools activities and BMX bike displays. In 2018 this free event attracted 7,000 visitors.

2.6.2 For 10 years, until 2016, a National Water sports Festival was held on Hayling Island seafront in early September. This event attracted an estimated audience of 10,000 spectators and 365 participants in 2016, generating an economic impact of £282,309. An evaluation of the event based on surveys of 600 people attending, estimated that weekend inspired 70% of spectators to take up a water sport activity and 64% to take up another form of physical activity. The report identified that if a further 1% of Hayling residents took up participation in health and fitness activities as a result of exposure to events such as this, it would generate an economic impact of £222,991 in health benefits and healthcare cost savings. 52% of local businesses reported the event had a positive impact on local spend. 80% of local residents surveyed had a positive or very positive view of the event. The modal average profile of spectators was male, aged 45–54, traveling from outside of Hampshire and with annual household earnings of over £60,000[2].

2.6.3 Unfortunately, from 2017 the National Water sports Festival (NWF) relocated more centrally within the UK and evolved into a paid entrance event. The 2018 event on Rutland Water reportedly attracted around 500 participants.

2.6.4 *Insight: The NWF event and the more recent Kite surf Armada event demonstrate consistent appeal and economic benefits drawings visitors to Hayling Island seafront. A future event programme developed around an enhanced water sports hub could help to develop the visitor season outside of the core July / August summer period and increase local participation in healthy lifestyle activities. This could have significant positive benefits for the local community, helping to reduce the pace of increasing health care costs and support the revitalisation of the seafront. The report into the NWF event calculated that if 1% of the local Hayling Island population was encouraged to participate in health and fitness activities, this would generate an economic impact of £222,991 in health benefits and healthcare cost savings. This calculation was based using Sport England's Economic Impact Calculator:* https://www.sportengland.org/our-work/partnering-local-government/tools-directory/economic-value-of-sport-localmodel/

2.6.5 The Beachlands car boot sale runs every Wednesday on the seafront throughout most of the year and attracts a sizable audience.

[2] *National Watersports Festival 2016 (Hayling Island): Impact Assessment Report for Havant Borough Council*

2.7 Tourist Information Centre

3.7.1 The Council operates a tourist information centre and beach office on the seafront at Beachlands. An analysis of the volume of enquiries, both tourism and council related indicate a year on year decline in numbers. This is mirrored nationally with the trend of consolidation and closure of many tourist information centres as more and more enquiries move online. Critical to improving the visitor experience will be the Council's ability to engage with visitors via online services. A physical beach office/ TIC presence on the seafront will remain an important asset and management point for the seafront but opportunities to diversify the function of the TIC by introducing retail elements to help sustain operating costs could be considered. This is a route that many Local Authorities have taken.

2.7.2 A good recent example is Bournemouth where a new TIC was constructed on the seafront in 2015. Responding to a steep decline of walk in enquiries, the new TIC shifted focus to provide significant retail space for gifts and souvenirs and access to online booking of services by other providers. The new facility was located at the point of maximum footfall and housed in a fully glazed structure that is inviting to enter.

2.8 Traffic flow

2.8.1 Traffic congestion during the summer months has been identified as an issue within the online resident and visitor survey conducted as part of this report, and elsewhere. It is important that tourism development proposals for the seafront incorporate alternative transport options such as improvements to cycle routes and public transport options.

2.8.2 Traffic congestion during the summer months has been identified as an issue within the online resident and visitor survey conducted as part of this report, and elsewhere. It is important that tourism development proposals for the seafront incorporate alternative transport options such as improvements to cycle routes and public transport options.

2.9 Camping / holiday park sector

2.9.1 In recent years the weak pound together with low consumer confidence have made UK holidays more appealing to domestic visitors and car sites/ holiday parks have benefited from this.

2.9.2 The camping sector has been characterised by a drive towards wider choice of accommodation experiences, particularly at the premium end. The development of 'glamping' in particular has been seen as a way of targeting younger audiences and families. Park operators are increasingly repositioning their offer from simply being an affordable way to holiday towards offering a higher standard and wider choice of accommodation whilst allowing visitors to connect with nature.

2.9.3 This approach can be seen across Hayling Island, for example, Sinah Warren has moved away from offering accommodation in traditional huts to a more boutique hotel experience. While other parks have introduced glamping and high-quality cabin accommodation offers to tempt a new generation of holiday makers.
In common with other sectors of the leisure and accommodation industry, camp sites are harnessing the power of websites and apps to make booking easier and more seamless.

2.9.4 The period 2011 to 2015 saw some decline in camping and caravan trips but with 15 million trips across the UK in 2015 the market remains significant.

2.10 Sample survey of tourism accommodation provision on Hayling Island

2.10.1 A review of accommodation provision on Hayling Island has identified around 822 guest rooms and at least 1759 pitches/ static caravan sites. Assuming an average capacity of 2 people per room and 4 people per static caravan, the Island has potential to accommodate around 8,680 staying visitors at full capacity.

2.10.2 Occupancy levels within the resort parks remain high, averaging between 96– 98% in some instances and based on year-round operations.

2.10.3 The sector is dominated by a small number of larger national players who control the majority of rooms and pitches. Operating on a national scale, these businesses are able to lever a higher marketing presence in the market, effectively being the primary promoters for the island's tourism economy. The downside to this is that these businesses have multiple locations to manage and centralised supply chains resulting in major management decisions being taken by a head office elsewhere in the country. This has the potential to result in reduced sensitivity to local community issues or collaboration with other local operators particularly with regard to marketing and promotion.

2.10.4 Significantly, the major holiday resorts offer a fully self-contained holiday experience from accommodation, all weather leisure facilities, outdoor organised activities and restaurants. There is no need for the visitor to leave the confines of the resort if they so choose. However, staying visitors are highly mobile with the vast majority arriving by car. The opportunities to enhance their visit experience of the rest of the island including the seafront should be embraced.

2.10.5 This approach can be seen across Hayling Island, for example, Sinah Warren has moved away from offering accommodation in traditional huts to a more boutique hotel experience, and is achieving around 98% occupancy based on over 50,000 guests per year. The staying visitor market on Hayling Island is very price sensitive with businesses operating dynamic pricing to smooth out fluctuations in demand. Driving up quality can introduce opportunities to charge a premium which can have a significant impact for long term development of these businesses.

APPENDIX D) THE COASTAL TOURISM ECONOMY IN 2018

Hotels with close proximity to Hayling Island

PROVIDER	NO. OF ROOMS	AVERAGE ADVERTISED ROOM RATE PER NIGHT FOR 2 ADULTS, AUG 2018
Bear Hotel (3 star)	42	£58
Premier Inn, Langston (3 star)	82	£63
Premier Inn, Havant (3 star)	58	£45
Brookfield, Emsworth (3 star)	39	£67
Travelodge, Emsworth (2 star)	74	£34
The Crown, Emsworth	9	£59

Hotels / Holiday Resort Villages on Hayling

PROVIDER	NO. OF ROOMS	AVERAGE ADVERTISED ROOM RATE PER NIGHT FOR 2 ADULTS, AUG 2018
Langstone Quays (4 star)	148	£63
Sinah Warren Coastal Hotel - Bourne Leisure (3 star)	258	£100
Lakeside Coastal Village - Bourne Leisure (3 star)	100	£111
Mill Rythe - Away Resorts	250	£79-£90

APPENDIX D) THE COASTAL TOURISM ECONOMY IN 2018

Caravan parks & camp sites

Havant Borough Council has licenced 1803 caravan sites on Hayling Island, based on 2013 data. The majority of sites are clustered around the south east of the island and within close proximity to the sea. Other sites are located in the central and northern areas of the Island. Some offer seasonal rental of static caravans (March to October) and range in price between £1836 and £2240 for the 2018 season. Others are available for short stay rental. Campsite tent pitches are also available typically charging between £20-£22 a night in August 2018 season.

PROVIDER	NO. OF CARAVANS/ PITCHES	AVERAGE ADVERTISED RATE PER NIGHT FOR 2 ADULTS, AUG 2018
Parkdean Hayling Island Holiday Park	416	£136
Elliots Caravan Park	4	£86 (sleeps 6)
The Oven Campsite		£22
Fleet Farm campsite	75	£20

Marinas

PROVIDER	NO. OF BERTHS
Northney Marina	228 berths
Hayling Yacht Company	227 berths
Sparkes Marina	140 berths
Wilson's Boatyard	Limited berthing

All marinas provide a range of boat services

B&B / Guest Houses

PROVIDER	NO. OF ROOMS	AVERAGE ADVERTISED RATE PER NIGHT FOR 2 ADULTS, AUG 2018
Waratah Lodge	10	£80
Golden Sun	2	£55
Newtown House	29	£79

APPENDIX D) THE COASTAL TOURISM ECONOMY IN 2018

Self- catering / Holiday rentals:

PROVIDER	ROOMS	AVERAGE ADVERTISED RATE PER NIGHT FOR 2 ADULTS, AUG 2018
Cockle Warren Cottage	5	unknown
High Trees	2	£97
Hayling House	3	£105
Nab Tower View	2	£100
White Caps	3	£130
Seaview	2	£205
Southern Bell	5	£240
Property in Southwood Road	2	£179
Apartment off Rails Lane	1	£80

AirBnB is perhaps the best known of a number of websites functioning as an online marketplace for private home owners and, increasingly, bonafide holiday accommodation operators to reach new customers. Growth in AirBnB properties across Havant Borough has risen from 0 in 2015 to 82 in 2016, 122 in 2017 and 173 in 2018.

During August 2018 there were 75 active hosts of which 28 are located on Hayling Island. The majority, 61%, achieved bookings for between 1 and 3 months in the year. The majority of properties advertised on Hayling Island are whole properties or apartments. Average occupancy achieved in August was 69%[1].

AirBnB properties are unregulated, offering individuals an easy way to rent out their homes or rooms to visitors. This places them at significant advantage to traditional guest house operators who will be faced with paying business rates and other charges. Increasingly, though, traditional accommodation providers are using the AirBnB platform, and others similar to it, as a new route to market their properties. In larger, international, cities such as Barcelona, Berlin and New York the AirBnB phenomena is attracting criticism and crack down legislation with the business model being blamed for driving up rents to the detriment of the residential market.

Airbnb self-catering / whole properties & rooms[1]

PROVIDER	NO. OF ROOMS/ PITCHES	AVERAGE ADVERTISED RATE PER NIGHT FOR 2 ADULTS, AUG 2018
The Garden Annexe	1	£86
The Old Workshop, Upper Tye Farm	2	£100
Bungalow in Stoke	2	£75
Bungalow, Staunton Ave	3	£84
House, West Town	3	£70
Apartment with Sea view, overlooking Beachlands	1	£53
Waterfront property, Selsmore area	1	£60
Fairlight chalet	1	£77
No. 8 Fairlight	1	£88
Studio, Salterns Lane	1	£74
Apartment near Fishery Creek	2	£220
Beachfront property	1	£78
Beachfront property	1	£80
Beachfront property	2	£90
Beachfront property	1	£67
Beachfront property	2	£157
Arreton Beach House	2	£101
Garden Apartment	1	£65
House	3	£162
House	2	£105
House	2	£89
House	3	£52
Room	1	£42
Room	1	£34
Room	1	£33
Room	1	£34
Sandy point, shared room	1	£95
Sunny Place	1	£65

[1] Airdna.co

APPENDIX E) SWOT ANALYSIS

APPENDIX E) SWOT ANALYSIS

STRENGTHS	WEAKNESSES
Tourism Market • Seafront has a catchment population 1,063,831 people living within 30 minutes drive-time, and is 1.5 hours away from London. Situated within 45 minutes drive-time to three of the UK's principal international gateways: Southampton cruise liner port, Portsmouth continental ferry terminal and Southampton Airport all offering easy access to and from the Continent and offers rail network connecting nearby Havant to Southampton, Portsmouth and London. • Located on the South Coast, within proximity of the UK's strongest performing coastal resorts yet retains 'hidden gem' status off the beaten track, offering 'in the know' visitors a chance to acquire social capital by sharing their discoveries via Facebook, Instagram, etc. • Island offers a range of accommodation options, primarily focused around holiday parks, camping and static caravanning, with signs that providers are expanding to offer a more boutique/ higher quality offer to broaden appeal. • Hayling combines 'Island getaway' feel with a feeling of escaping the pressures of city life. Access for holiday makers staying on the island to extend the range of experiences with leisure attractions and shopping in nearby Portsmouth a short 'ferry trip' away, albeit with the pressures caused by single lane access on and off the island. • Marks of excellence in the form of Blue Flag and Seaside Award beaches, nature designations and European Centre of Excellence award for Hayling Sailing Club together with reputation around water sport heritage help to elevate brand awareness among families, nature lovers and water sport enthusiasts. • High quality gateway onto Hayling, promoting an 'island' feel and sense of escape from the pressures of modern life, yet easier to get to for city dwellers than the Isle of Wight. • Well positioned geographically to take advantage of domestic and international tourism trends over the next 15 years. • Relatively unspoilt and this gives it significant difference to its coastal neighbour Southsea. • Seafront has retained some traditional seaside attractions. • Island has reasonable capacity to handle a significant increase in population from visitors, although there is local concern around capacity of the road network at key points in the Island. • Beach Huts, Car and Motorhome parking 'right on the beach' is a great attraction	**Tourism Market** • Lack of brand awareness and market presence, its appeal 'drowned out' by competitor destination seafronts like the Witterings and Southsea and by the pull of larger, year-round resorts of Brighton, Eastbourne and Bournemouth who have invested in regeneration. • It's proximity to an island with a brand, 'Visit the Isle of Wight.' • Increasing competition from other city leisure destinations such as nearby Portsmouth which offer year-round and all-weather leisure attractions, a wide range of retail, modern hotel accommodation appealing to business and holiday markets and brands. These combine to squeeze out mass market tourism appeal of Hayling seafront particularly around the Beachlands area leaving it chasing value for money and a 'race to the bottom'. After several decades this has led to a lack of investment and loss of sustainability. Hayling Island seafront appeal to traditional tourism markets is close to losing critical mass. • A lack of national branded accommodation options on the island, with the exception of Warner & Hayling Island holiday centres, contributes to low public awareness in an increasingly competitive and highly brand- driven leisure market, leaving the seafront dependent on a core market of low spending residents and visitors in search of nostalgia. • Lack of a significant Air BnB presence • Financial pressures on Local Government leave funding for non-statutory tourism services in long term decline. This results in lower budgets to promote tourism and maintain infrastructure, leading to loss of critical mass and presence in the marketplace. • Whilst a wide range of appealing leisure activities are possible on Hayling seafront, many of these take place informally or 'under the radar' resulting in poor access to/ lack of knowledge of product availability for visitors and potential visitors. Lack of product knowledge drives potential visitors to seek out other destinations that work hard to appeal to niche interests such as water sports. The typical visitor to the coast today is cash rich and time poor. They seek to maximise the range of experiences that can be accessed easily, flexibly booked online, and enjoyed with a minimum of fuss and travel once arrived in destination. Visitor experiences on Hayling by contrast are fragmented and hard to access. • No true destination eateries / cafes • Current commercial seafront offer is heavily dependent on seasonal visitor appeal and is highly weather dependent, with little to promote visits out of the summer or when weather is poor and tides are unsuitable for water based activities. • Lack of connectivity/legibility with Billy trail and the seafront.

APPENDIX E) SWOT ANALYSIS

STRENGTHS	WEAKNESSES
Natural Environment • High quality environment including Sinah Common SSSI, Beachlands SNCI, Gunner Point Countryside Heritage site, European SAC and adjacent or in proximity to the seafront a number of local nature reserve, SPA and Ramsar sites. • High quality Blue Flag and Seaside Award beaches recognising bathing water quality and cleanliness / provision of facilities • Tranquil areas of the seafront offering contemplative appeal • High quality views across the Solent with watersports and shipping activating the view and providing points of interest • Nature trails with some interpretation at West Beach • Low level of built infrastructure across significant parts of seafront enhances unspoilt feel (but with notable exceptions!) • Good and scenic walking and running trails • Can be accessed by the safe Billy Track cycle route from Havant that runs through scenic countryside and along the water • Annual average-wind and tidal conditions underpin ideal windsurfing, kite surfing and sailing environment. **Built Environment (architecture)** • Some higher quality older buildings overlooking seafront eg: Norfolk Crescent and more recent art deco inspired style golf course club house. • Some well cared for seafront buildings such as Inn on the Beach (albeit under threat from coastal erosion) • Quirky beach huts some of which have been decorated and repainted with imagination and appeal.	• - Loss of beach to erosion reducing Beach Huts, car and motorhome parking and impacting on revenue to the Council. **Natural Environment** • Management of natural environment is uneven with some poor quality eg: tracks and car parking areas • Lack of interpretation and wayfinding to connect and direct them away from sensitive areas. • Informal and encroaching car parking having a negative impact on sensitive environments. • Indeterminate areas of SSSI with evidence of former managed use appear to be abandoned. • Removal of coastal defences west of Inn on Beach impacting on access to beach and water (steep shelving). **Built Environment (architecture)** • Organic placement of beach huts in certain locations detracts from accessibility to the beach and views of the coast for other users • Prime areas of beach replaced with car parking, represents poor use of space • High level of poor quality leisure buildings and residential, particularly to the East, negatively detracts from the high quality natural environment and visual appeal of the seafront • Lack of variety / range in food and drink offer across seafront • Below par amusement park facilitates • Natural coastal dynamics significantly affected by the Inn on the Beach concrete which is projected to increase beach erosion in the immediate vicinity. • Apparent lack of cohesive environmental groups on Hayling Island for the Council to work collaboratively with. **Built Environment (Infrastructure)** • • Electrical supply capacity for expansion • No public showers/ changing facilities • Sewerage network limited capacity / connection across seafront • Wifi & 4G signal strength (unknown) • No street lighting along seafront

APPENDIX E) SWOT ANALYSIS

STRENGTHS	WEAKNESSES
Transport and Access • Considerable car parking provision spread across seafront area provides possible opportunities to rationalise and re-use space for other visitor attraction/ beach hut / overnight stay / café opportunities • Section of level and accessible promenade east of Beach lands • Sections of cycle routes including the much loved Billy Track that commences in Havant and features as part of the national cycle network. • Foot and cycle ferry linking from west of the island providing access to Southsea/ Portsmouth • Seafront railway provides beach front leisure transport. **Leisure Facilities** • Some evidence of zonal approach to facilities on the seafront eg: watersports and swimming at West Beach, traditional family amusements at Beach Lands and connecting seafront railway to retail area. • Skate, play and exercise facilities at Eastoke • Evidence of some investment by private sector, eg Inn on the Beach. • Commercial investment in tourism leisure offer outside of seafront at golf course, sailing club, boat moorings and holiday parks help to sustain appeal to niche and growing markets. • A number of small B&Bs and private apartments for rental on the seafront, some showing signs of recent investment. **Events** • Annual Kite surfing Armada Festival in June attracts national following, key brands, celebrities and taste makers.	• Poorly presented bins/ mixture of styles • Haphazard location and provision of public seating. Many feature commemorative plaques so unlikely to be acceptable to relocate. • Lack of public seating provision or wet weather shelters. **Transport and Access** • Single access road on and off the island, creating congestion particularly during peak summer. • Poor access down to the waterline for people with limited mobility and some water sport enthusiasts. • Disconnected sections of seafront, with poor transport access east/ west. • Lack of public transport connections across seafront and links to ferry. • Lack of public transport across seafront. • Hayling Billy Track leisure route in poor repair along eastern coastal edge **Leisure Facilities** • Limited seasonal narrow gauge train operation with no clear rationale for destination at eastern end of track. • Funland and amusement arcade at Beachlands in need of significant reinvestment and re-orientation. Organic growth of buildings within Funland have turned their back on the visitor approach and beach making for an unappealing entrance. • Amusements building and beach car park/ event space block prime views and access to the beach at principal 'gateway' to the seafront location. • Road layout at Beachlands is poor with bottleneck entry points to car parks, suggesting high potential for queues in Summer. • Kiosks across seafront are poor quality and randomly placed • Many facilities look tired and in need of overhaul • Facilities of limited appeal, especially to younger people • Little variation in food and drink offer • High reliance on low spend appeal. No 'halo' leisure offers to drive up spend • Visitor offer heavily weather dependent and highly seasonal, impacting negatively on viability.

APPENDIX E) SWOT ANALYSIS

STRENGTHS	WEAKNESSES
Community • Heritage of the seafront, especially World War II Normandy practice invasions and home of windsurfing • Strong impression of community ownership / pride in Seafront railway • Beach hut community • Strong range of informal organised and varied activities/ groups using the seafront, particularly at West Beach eg: water sports groups, horse riders, dog walking groups, fishing etc. • Likely to be a strong community feel amongst the beach hut tenants • Strong performing golf course overlooking seafront with high quality facilities (top 100 in England), new club house featuring hireable event space for up to 200 people, open 7 days a week and well patronised in the week by some of the 1000 members. Particularly popular with local retired but active population. • No community forum or group in place to focus on wider ranging issues and champion improvement • Perception that some community organisations are anti-change. **Brand and Reputation** • Some niche appeal for water sport enthusiasts due to heritage as the spiritual 'home' of windsurfing. • Sailing and golf club reputation.	**Events** • Loss of national watersport festival. Few events to activate seafront other than Kitesurfing Armada Festival and car boot sales. **Community** • Likely local perception of poor road network/ congestion contributes to some ambivalence to the benefits of attracting visitors and the spend this can bring to the community & improvements to local amenities • Mostly retired residential population, fewer employment opportunities for young people • No focal or wider view community organisations • Community organisation perceived as anti change. **Brand and Reputation** • No clear place branding for the seafront and Island as a whole making it hard to differentiate the offer from competing regional seafront destinations. Destination marketing requires a clear strategy with little in the way, currently, in terms of linkage to successful brands already established on Hayling such eg: some of the holiday parks, sailing club and golf club, etc. • No clear place-brand promoted for the seafront. Nothing to differentiate in a crowded market of competitor destinations Destination marketing needs a clear strategy (but first needs collateral to work with) • Little or no linkage to successful brands on the Island eg: holiday parks, sailing club, etc.

APPENDIX E) SWOT ANALYSIS

OPPORTUNITIES

Tourism Market

- Identify niche markets and establish core brand / cultural identity for Hayling Island seafront to appeal to these markets (eg: water sports, eco-adventure, unspoilt , unknown)
- Curated itineraries, linking up all tourism offers on the island to maximise range of experiences that can be seamlessly accessed with minimum of hassle. Build around a strong place- brand for the island. Allow visitors to easily customise their package eg: Go City Cards in US cities
- Develop and brand a round Hayling Island route, which encompasses the seafront and designed to appeal to light leisure walkers and cyclists.
- Link in to walks, cycling , visits to neighbouring places (ie Eastney via the ferry)
- Introduce access to visitor experiences at different price points (eg: visitor accommodation on seafront from no-frills to boutique luxury, food experiences from good quality take away to fine dining.)
- Encourage potential visitors to plan online before their visit with a range of 360 degree videos and interactive information about what they might see and find.
- Develop placemaking, event spaces and wayfinding. Encourages visitors to 'wishlist' online via sites like Pinterest and encourage visits to collect social capital, by sharing on Facebook, etc.
- Appeal to visitors increasing quest for authentic experiences via their stomach. Great food experiences linger in the memory.
- Develop use of augmented reality apps to tell the stories of Hayling Island Seafront's cultural history eg: war time and water sport heritage eg like: 'Dinosaur Isle' app developed by Isle of Wight.
- Tap into nostalgia, 56% of adults visiting the coast do so because of previous childhood visits. Opportunity to reinvent Funland experience for a modern audience through creative appropriate rebranding and interventions, eg: Dreamland.
- Why do people visit the seaside? Top 3 reasons: 73% are drawn to the beach. 40% drawn by the scenery. 40% by overall price of the holiday. Hayling seafront needs to improve access to the beach, maximise and frame coastal views and celebrate its rich natural environment via interpretation and branding. Also, combine all three motivations via a range of unique and affordable experiences such as overnight holiday beach huts.
- The summer of 2018 will live long in the memory and can provide a catalyst for further growth in the stay-cation sector.
- Millennials and Gen Xers are rediscovering the British coast, turning their backs

THREATS

Tourism Market

- Likelihood of further decline without investment, adversely impacting on reputation for commercial tourism provision on Hayling (ie: holiday parks)
- Increasing competition from other seaside towns successfully rebranding and investing in regeneration.
- Increasing competition for leisure time from other sources (eg: home entertainment and technology)
- Loss of potentially un-sustainable visitor attractions (eg: Funland and amusement arcade or Inn on the Beach, due to coastal erosion.
- Loss of National Watersports Festival, which has relocated to Rutland.
- Continued political and economic uncertainty leading to a drop in leisure spend.
- Rise of AirBnB on the island (as elsewhere) and the threat this may represent to traditional accommodation businesses eg: B&Bs due to lack of regulation/ lower operating cost base.

Natural Environment

- Coastal erosion and abandonment of coastal defences causing loss of sandy beach, easy and safe access into the sea, loss of access across shingle beach either side of Inn on the Beach
- Un-managed nature of the area undermines the habitats that for a key part of the attractiveness of this coast
- Establishing a funding mechanism for nature management.

Built Environment (Architecture)

- Lack of investment in buildings coupled with exposed marine environment resulting in unsustainable structures
- Coastal flooding constraining viable development
- Coastal erosion requiring relocation or loss of assets at West Beach (eg: beach huts and Inn on the Beach)
- Unmanaged nature of the area undermines the habitats that should be part of.

APPENDIX E) SWOT ANALYSIS

OPPORTUNITIES	THREATS
on security and financial uncertainties and over popularisation of many European destinations. For many the Mediterranean is no longer cool! • For some “early adopters” Hayling Island could be marketed as a place of undiscovered opportunity. • Some local beaches such as West Wittering are becoming overcrowded. This can work in Hayling Islands favour. **Natural Environment** • Proximity and views to a famous island brand, Isle of Wight, lean on that. • Development of nature trails and interpretation. • Development of nature trails, interpretation and protected and managed areas • Creation of Nature reserve **Built Environment (architecture)** • Most of the café’s / eateries, and the amusement park present exciting opportunities to be significantly improved. • Opportunity for sea view destination cafes/ eateries (eg: East Beach Café, Littlehampton) • Low cost of land, relative to other coastal locations within the region, and historic low levels of investment result in the seafront retaining an un-polished, quirky and authentic feel in parts, adding to visitor appeal that stands out from more ‘gentrified’ or identikit coastal locations. • Nothing feels overdeveloped or at capacity. There are clear visible signs of “possibilities” . **Built Environment (infrastructure)** • Opportunity to introduce wayfinding and interpretation • New public seating & shelters • Council’s wider regeneration plans to grow industrial on the mainland within Havant (eg: Dunsbury and Brockhampton), further diversify local economy and creating wider employment opportunities for residents of Hayling Island.	the attractiveness of the area. • Establishing funding mechanism for Nature management. **Built Environment (Infrastructure)** • Coastal erosion requiring relocation or loss of assets at West Beach (eg: car parking, coastal path access). • Policy of no active intervention/ removal of flood defences place Billy Trail Track under threat. In the future, the trackway will have to be re-located in land. **Transport and Access** • Increasing congestion of road network onto island, limiting development potential. • Loss of Hayling Billy track to erosion. **Leisure Facilities** • Lack of investment leading to closure of facilities, leading to further drop in visitors • Local authority budgets under pressure to save on non-statutory services. (eg: tourist information/ beach office, public toilets) • Loss of Hayling Billy track to erosion **Events** • Loss of events such as National Watersports Festival and subsequent loss of visitor awareness. **Community** • Low quality housing, aging population, lack of opportunities for young people leading to increasing pressures on social services budgets and loss of a new generation of wealth creators. Resulting in closure of shops and restaurants. • Diverse community factions undermine greater value and potential of the island • Lack of community cohesion risks loss of opportunity to maximise the value and potential for the island.

APPENDIX E) SWOT ANALYSIS

OPPORTUNITIES	THREATS
Transport and Access • Promote transport link via ferry to Southsea /Portsmouth. • Proposal for Community Infrastructure Levy funded bus link between Beachlands and ferry • Consider ideas like Segway Safari/ electric bike links from Southsea to Hayling Island via ferry. • Consider introducing land train link across seafront from Beach Land to Ferry point. • Create new gateway to seafront at Beach Lands via re-routed traffic, creating new public space • Opportunity to improve connectivity/ legibility between Billy trail and the seafront **Leisure Facilities** • Watersports hub at West Beach offering better access to the sea. Incorporate changing facilities, equipment hire, classroom. Could be low cost natural timber clad structures built around re-purposed shipping containers • Low impact eco-friendly solar powered overnight stay beach hut village designed to sit lightly within fragile landscape overlooking West Beach. Designed to appeal to families, nature lovers and water sport enthusiasts. Opportunity for Council to manage in house and generate revenue to invest in habitat and infrastructure improvements • Board walks, trails with timber wayfinding that interweaves within an ecologically enhanced grassland. Seating areas and interpretation points. Sociable spaces featuring public BBQs, table tennis, giant board games, onland sand (and water ?) play and public art by local artists inspired by themes of local history, water sport culture and nature • Review cluster and layout of amenity buildings Surf Shack and approach road, creating a new gateway to the site with low impact public realm, children's adventure play and use of recycled groyne timbers • Camping options (tents) and motor-homes • Options to re-frame the view with small look out towers • Small, distinctively designed kiosks – perhaps an architecture competition (eg: Lincolnshire Bathing Beauties and Boscombe Accessible Beach Hut competitions).	**Brand / Reputation** • Loss of identity for community. Hayling island is not utilising the nascent feel good factor about the British coast. **Political** • Land owners, trusts and other key stakeholders may not share vision for regeneration. • Commitment to long term investment in promoting tourism on the island.

APPENDIX E) SWOT ANALYSIS

OPPORTUNITIES	THREATS
Events • Development of pop up event programme, based around coast and its resources **Community** • Activate seafront with extended seasonal usage including visitor accommodation to make for safer community space • Establish a Community Board that has a positive agenda and brings together diverse groups to explore the potential for delivering improvements on the island for all. **Brand / Reputation** • Brand opportunities based around: A) Island appeal B) Relatively undiscovered status C) Clear opportunities resulting from relative affordability and opportunities for leisure business start ups D) Drawing out Hayling Island's cultural identity Brand development needs to be sustainable and practical to implement within Council resources.	

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.1 Throughout August and Sept 2018, a HemingwayDesign led team ran an online survey for residents, visitors, people who work on the Island and those who have left to live elsewhere. The results help to understand the place better and what it means to the respondents. It will then inform proposals to regenerate the seafront in the West Beach , Beachlands and Eastoke areas. The following results are taken from 01/10/2018 at which time the survey had a total of 865 participants, of which, 567 were residents and/or work on the island and 263 were visitors/ holiday makers. The results have contributed to inform proposals to regenerate the seafront contained later in this report (Chapter 9).

The most common views can be summarised, in no particular order, as:

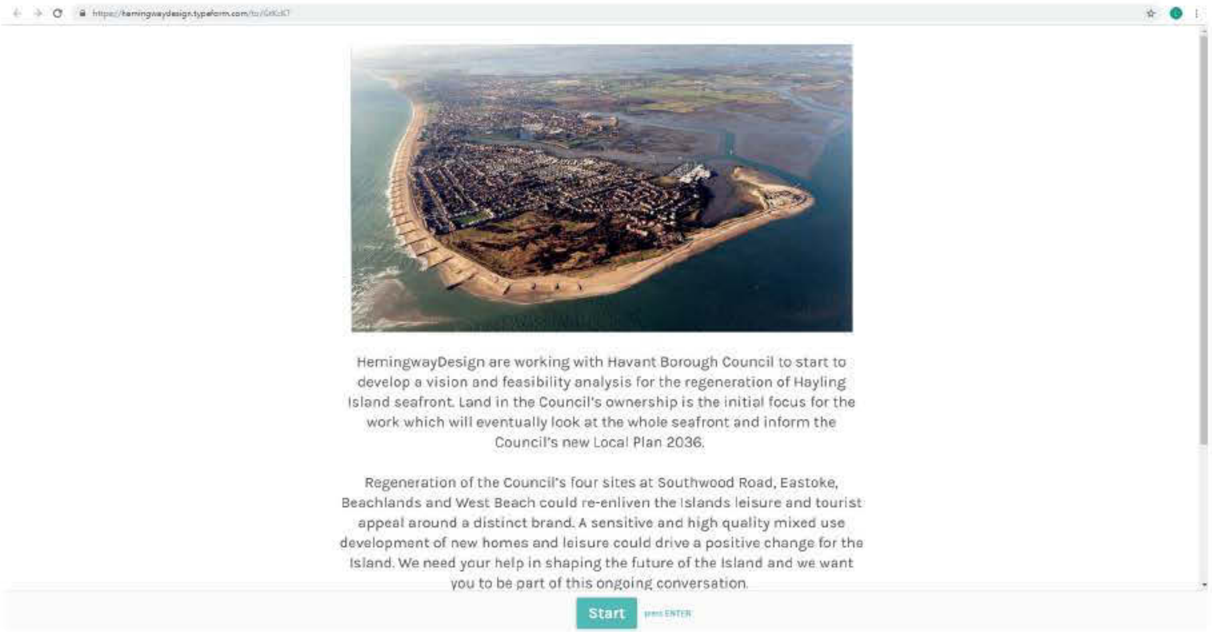
- Excellent for water sports activities and swimming
- Quiet, unspoilt feel with expansive views
- Great for walking / cycling
- High quality natural environment
- Never crowded
- Lack of commercial development
- Clean, safe family friendly beaches
- Ample parking
- Formerly being able to stay overnight on the beach (motorhomes)
- Proximity to leisure attractions and Portsmouth city centre

A small number of negative comments were also made. These included:

- Seafront is accessible but not very attractive
- Needs an injection of life, feel it has gone to sleep
- Has feeling of many seaside towns down on their luck

The views of those who live or work on the Island agreed with comments from visitors. Comments displayed a higher level of awareness of nature designations and a more reflective appreciation of the semi-rural feel of life on the Island as an escape from the bustle of near by Portsmouth. Some residents drew comparisons with nearby Southsea seafront, noting that Hayling Island seafront was less developed and more natural in feel.

Other key discussion points included: the need for regeneration to focus on attracting visitors who will spend more and stay longer rather than increasing the overall volume of visitors. Also, a need to set out a clear vision for the future of tourism development on Hayling Island seafront that key stakeholders can champion and collaborate.



APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.2 Key findings

The average age of respondents who either visit or reside and work in Hayling Island was 55 years old, which is younger than the average demographic of the island.

Based on responses to the online survey, the catchment for visitors to Hayling Island seafront clusters around the metropolitan areas of Portsmouth, Southampton and follows the M3 corridor from Winchester, Basingstoke to London. Average drive time is around one hour. Fewer people who took part in the survey were from the coastal areas east of Hayling Island. The 488 postcodes recorded from the survey are plotted in Figures 01, 02 and 03.

[LINK TO ONLINE MAP HERE]

A wide spread of ages took part in the survey, but predominantly fell between 45-64 years old. Given that 39% of the population of Hayling Island are over 65 (the highest borough-wide), this result suggests a broad demographic are interested in and could be attracted to the island.

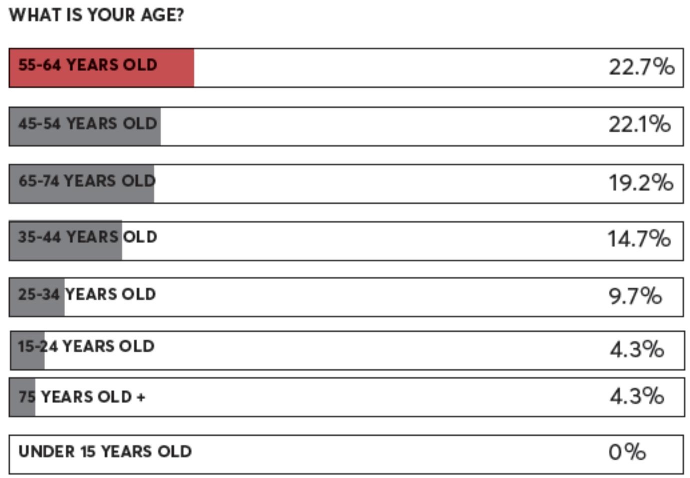


Figure 04

3.3 Key findings

The word cloud (Figure 05) has picked out the most frequent words used by respondents when describing what they think makes Hayling Island a special place. They have been grouped into their three main categories: Environmental, Social/ Aesthetics and Amenities/ Activities. This shows the range of qualities that respondents currently believe make Hayling Island special and those that should be maintained and enhanced through the design.

The most frequently used words were 'beach', 'sea front', 'natural', 'beautiful', showing the respondents' appreciation of the area's natural assets. Active pursuits, including walking and water sports activities, were also popular along with ties to the community and family.

"The ability to park, stay over, BBQ and chill while able to take part in the water activities. Also a good fish and chip shop!"

-PUBLIC RESPONSE

"The wonderful open aspect , fairly undeveloped and great views of Solent and Isle of Wight"

-PUBLIC RESPONSE

"For the whole of Hayling, it's the partially rural nature and the "wildness" of it's coastline, particularly the western and eastern coastlines. For the Seafront particularly, it's about keeping any development contained within "honeypot" areas and not spoiling those areas that also currently have that 'wilderness' feel about it."

-PUBLIC RESPONSE

WHAT DO YOU THINK MAKES HAYLING SEAFRONT AN ATTRACTIVE PLACE TO LIVE AND WORK CLOSE TO OR VISIT?

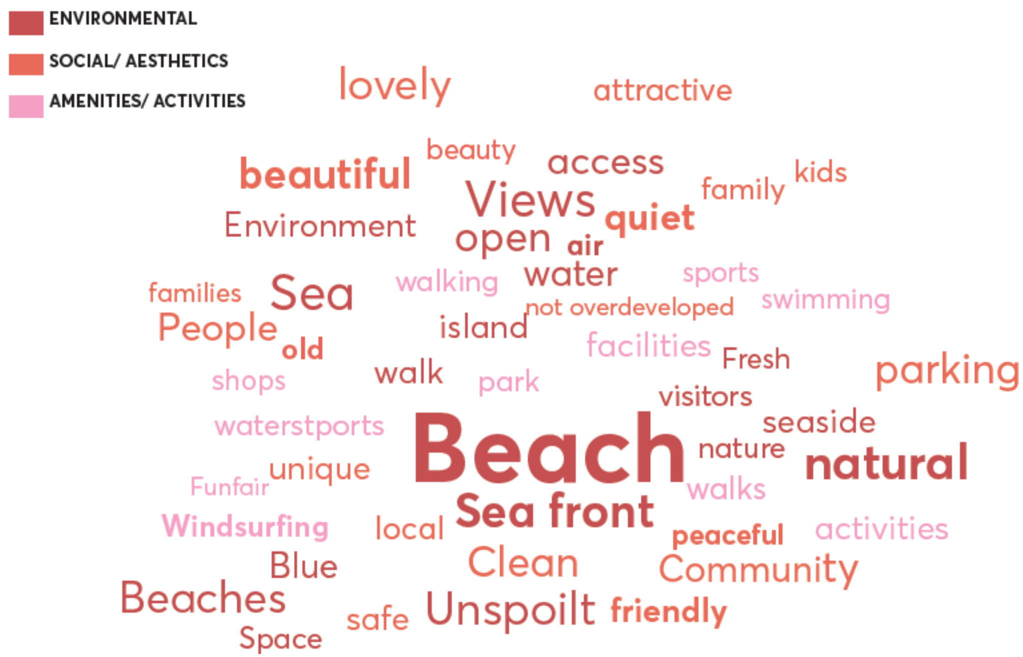


Figure 05

3.4 Key findings

Cycling and walking are clearly popular activities when people arrive at the seafront. Thus, way-finding and clear, good quality pathways are needed to maintain this and allow it to be accessible to a wide demographic and users of different abilities. Additionally, the popularity of cycle routes could indicate a need for bike docking, bike repair stations and hire facilities in the area for visitors to use.

The paid for transport options were not so popular for getting around Hayling Island. Many comments indicated that high fares made the buses too expensive to use regularly .

Most used Hayling Island seafront as a space to spend time with family members, children or friends, therefore, a family orientated and multi-generational offer would be suited to the area. Interventions in the landscape could be made to enhance this social experience and create better opportunities to meet up and stay.

Many also stated that they spend time alone in the area and so there needs to be easy accessibility to allow residents and visitors (particularly the elder generations and those with disabilities) the freedom to move around and take part in the offers along the seafront.

"Nice walks, attractive scenery-coastal views. Access for all ages and with mobility issues"

-PUBLIC RESPONSE

"Hayling has rare space access to a stunning sea vista used by the young to the elderly for all types of recreation"

-PUBLIC RESPONSE

"As a family with young children living on the island, I would look for low key, smaller developments that preserve the common land and open spaces with a variety of smaller play areas."

-PUBLIC RESPONSE

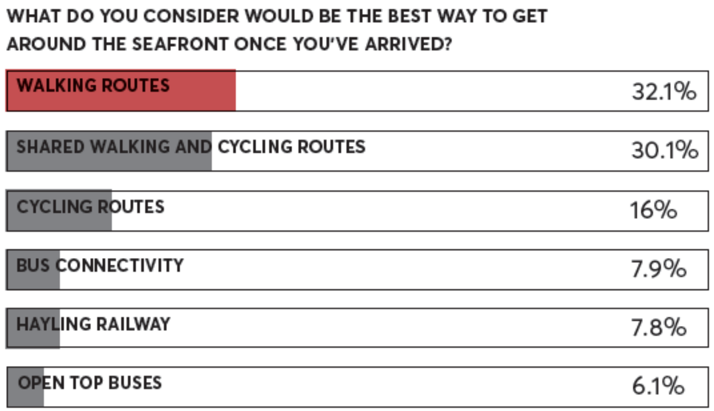


Figure 06

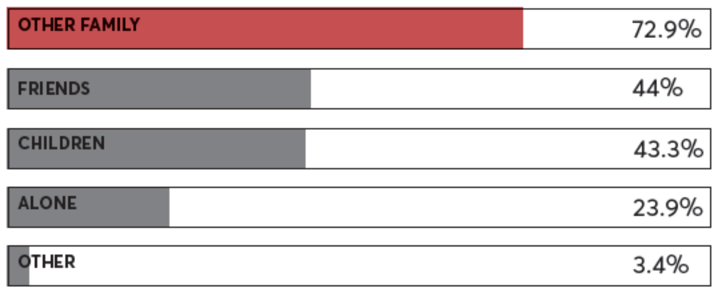


Figure 07

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.5 Key findings

Results in Figure 08 show that the most popular activities along the sea front are walking particularly with dogs (11 comments), running, cycling. This is followed by nature and location-centric pursuits (beach-based and water-based activities). These kinds of activities can and should be encouraged and enhanced through better facilities and access. Lack of wheelchair and pushchair access was commonly commented on.

There are a low number of respondents utilising the free to use leisure facilities i.e. skateboard , exercise equipment , playgrounds and volleyball. This could suggest that there is little demand for the exiting types of facilities or that they are not advertised clearly enough to potential users (and possibly reflects on that on the whole the respondents to the survey do not come from this demographic). Other activities that people took part in were: spending time at their beach huts or camper vans (14 comments), sitting and enjoying the view (4 comments), Beach-combing and litter picking, particularly washed up plastic (4 comments), bird watching (3 comments) and armada or water sports competition events (3 comments).

Eating/ drinking in the cafes or kiosks were also a popular activity and what most people mostly spent their money on during their last visit to the sea front. This is followed by parking and shopping in the local stores. Many commented that they had not spent any money on their last visit since they currently live in the area (29 comments), took their own food and drink (3 comments) or chose not to go the Hayling Island at all due to travel costs being too expensive and unreliable (3 comments).

THINKING ABOUT THE LAST TIME YOU VISITED THE SEAFRONT AT HAYLING ISLAND, TELL US WHAT ACTIVITIES YOU TOOK PART IN?

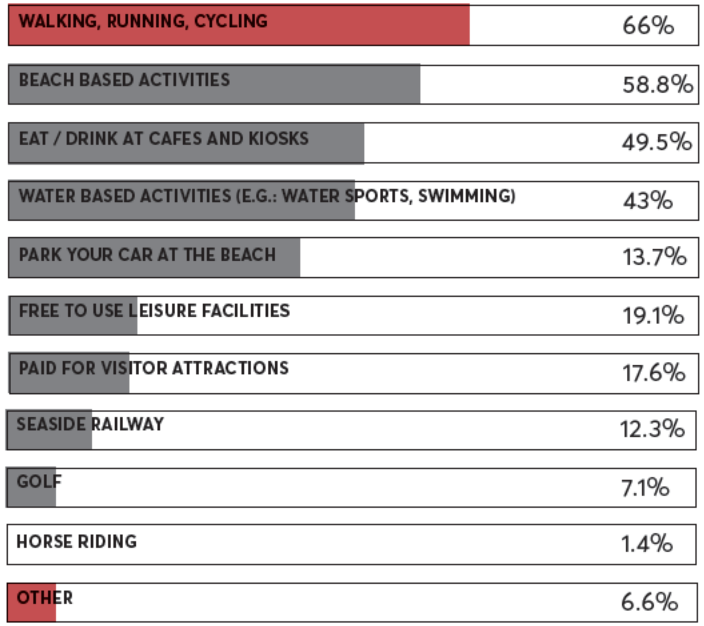


Figure 08

WHAT KIND OF THINGS DID YOU SPEND YOUR MONEY ON DURING YOU LAST VISIT TO HAYLING ISLAND SEAFRONT?

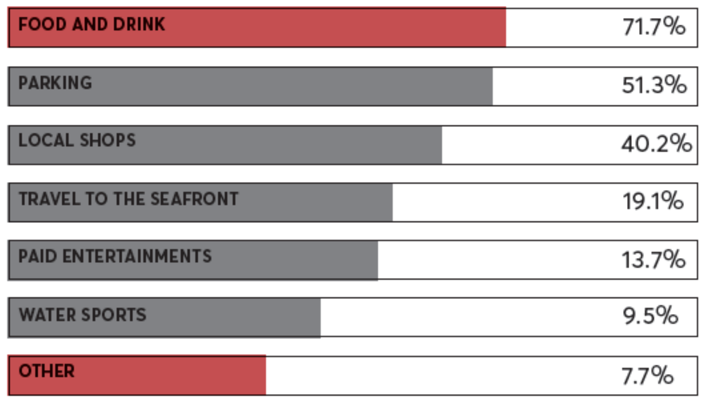


Figure 09

3.7 Key findings

The activities that residents, workers and visitors took part in have been separated in Figure 10. Improvements made to support water-based activities are likely to be enjoyed by residents and support the tourism offer. Similarly, any access improvements along the seafront for cyclists, walkers and runners, are likely to benefit residents and visitors. Car parking is predominately used by visitors to the Island and pricing policy may be geared with visitors/ island congestion in mind.

The current range of paid-for attractions on the seafront, including the seaside railway, are less patronised by visitors than residents, suggesting they offer only limited appeal to the tourism market. This is consistent with a view that the traditional seaside attractions such as the fun fair and amusements at Eastoke offer very limited appeal to today's audiences.

Free to use leisure facilities are currently geared towards the needs of residents and less so towards visitors. The golf course, which occupies a prominent and sizable site on the seafront and is marketed as one of the finest courses in the country, but plays a small but significant role in the tourism appeal of the seafront. This may have potential to generate further appeal to visitors.

Other notes made on the existing offer include the 'removal of unsightly & poorly positioned HBC seafront toilet facilities'.

Key to underpinning investment and regeneration into the seafront is visitor and resident spend. The most popular area of spend on the seafront was on food and drink, by 71% of respondents, followed by parking, 51%; local shops, 41% and travel to the seafront, 18%. Only 39% of visitors to Hayling Island seafront spent money in local shops, highlighting a lack of retail options or awareness.

64% of visitors spent money on car parking at the seafront. By contrast, 42% of residents or those working on Hayling Island spent money on car parking. Visitors and holiday makers spending leisure time on the beach identified a number of elements that currently make Hayling seafront an attractive place. A full list of responses can be found at Appendix C.

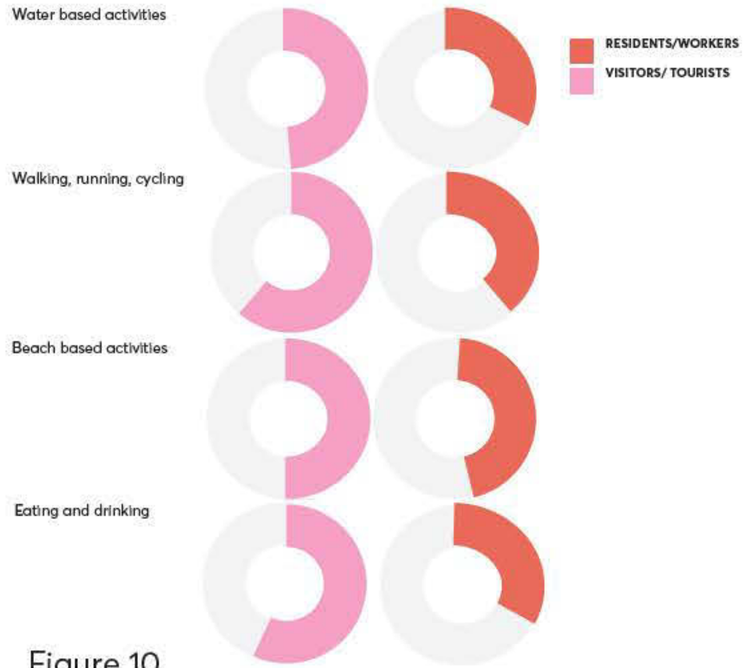


Figure 10

Type of activity during last visit	Residents / Workers (865)	Visitors/ Holiday Makers (263)	Total
Water based activities	32.7% (283)	49% (129)	49.5%
Walking, running, cycling	47% (415)	51% (134)	66%
Beach based activities	37.8% (327)	60.8% (160)	58.8%
Eating and drinking	31.6% (273)	55.5% (146)	51.1%
Parking	22.3% (193)	60.5% (159)	43%
Visit paid attractions	11.6% (100)	17.1% (45)	17.6%
Golf	5.5 % (48)	4.6% (12)	7.1%
Seaside railway	8.8 % (76)	9.9% (26)	12.3%
Horse riding	0.9 % (8)	1.5% (4)	1.4%
Free to use leisure	13.9% (120)	15.2% (40)	19.1%

Figure 11

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.8 Key findings

Figure 12 shows the overall majority of respondents believed that an indoor/ outdoor food market would be suitable for Hayling Island beach front. This shows an interest in new eateries and options which are flexible across seasons. Other interventions that had strong appeal were bike hire facilities, public BBQs, sheltered seating and all inclusive play equipment.

As stated previously, the current most popular beach front activities by both residents and visitors are walking, running cycling and there is a desire for more attractive and navigable routes connecting the coastline. The interest in bike hire facilities compliments this recurring idea of an active seafront. Public BBQs and sheltered seating would help enhance the public realm whilst all-ability play equipment would be attractive to both the older population and younger generations.

The ideas which were not so attractive included: outdoor table tennis, skate-able landscaping and a lookout platform. There is an existing skateboarding area between the West Beach and Beachlands sites and should be kept to this area.

“This is an opportunity to transform this beautiful place into something wonderful making the most of the seafront with eateries, cafes, nice playgrounds and activities to keep our children safe and entertained outdoors. Make Hayling a place to be more proud of!”

-PUBLIC RESPONSE

PLEASE CLICK THE IMAGES THAT YOU THINK ARE SUITABLE, IF FUNDING ALLOWS, FOR HAYLING ISLAND SEAFRONT

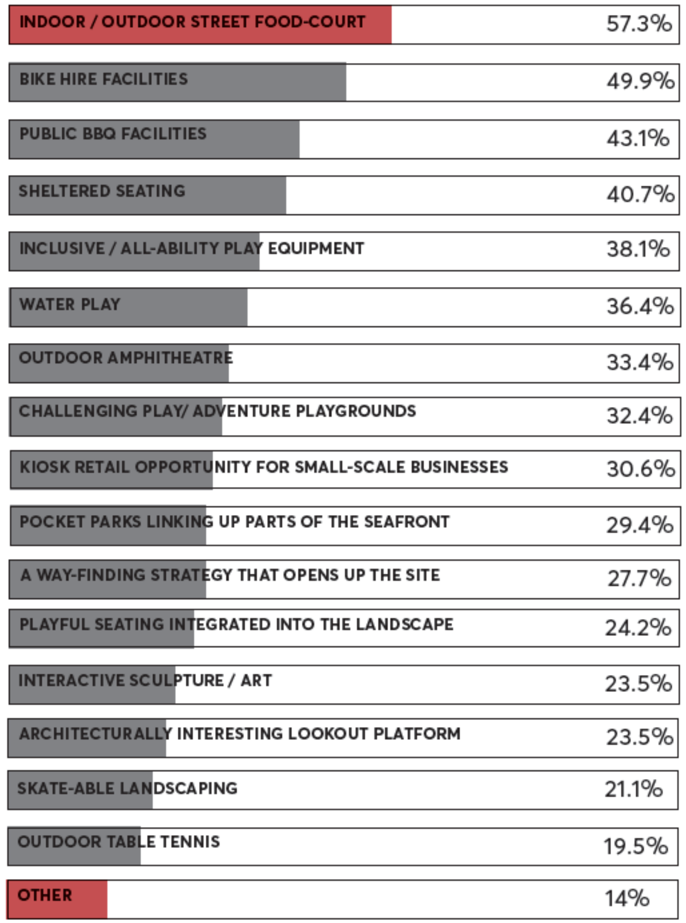


Figure 12

3.9 Key findings

The differences between the "wants" of residents of Hayling Island and its visitors are shown in Figure 13. Generally, respondents from both groups had the same thinking about what kinds of activities would be suitable for the sea front. Residents believed that street furniture was more important to them whilst hire facilities and play equipment were slightly more attractive to visitors.

Other popular ideas that both residents and visitors believed were suitable for Hayling Island included:

- A Swimming Pool/ Splash Zone **25 comments**
- Overnight camper van parking and facilities **13 comments**
- Better parking **8 comments**
- Water Sports centre e.g. changing facilities, launch site **6 comments**
- Showers after swimming **4 comments**
- More accessible beach facilities hire **4 comments**
- Better interpretation of existing wildlife **3 comments**
- Events e.g. outdoor cinema, street artists, tour the island challenge **3 comments**
- Modern gift shops **3 comments**
- Paved promenade **2 comment**
- More sand/ other offshore sea defences **2 comments**
- Full Wheelchair access to the waters edge
- Bike parking and locking facilities **2 comments**
- Office/studio space for creatives **1 comment**

Type of activity for the site	**Residents / Workers (567)**	**Visitors/ Holiday Makers (263)**	**Total**
Indoor/ outdoor food court	21.7% (123)	20.9% (55)	**57.3%**
Outdoor table tennis	7.2% (41)	9.5% (25)	**19.4%**
Challenging play/ Adventure playgrounds	11.6% (66)	12.5% (33)	**32.4%**
Inclusive / all ability play equipment	15.2% (86)	15.6% (41)	**38.1%**
Interactive sculpture / art	9% (51)	11.8% (31)	**24.2%**
Bike hire facilities	18.9% (107)	20.2% (53)	**49.9%**
A wayfinding strategy that opens the site and connects different points along the seafront	12.5% (71)	11.8% (31)	**29.3%**
Kiosk retail opportunity for small-scale businesses	12.3% (70)	12.9% (34)	**30.6%**
Public BBQ and eating spaces	16.6% (94)	18.6% (49)	**43.1%**
Architecturally interesting lookout platform, accessible to the public	9.2% (52)	10.6% (28)	**23.5%**
Outdoor amphitheatre for staging cultural events	14.6% (83)	11.8% (31)	**33.4%**
Dancing water fountains	14.8% (84)	13% (35)	**36.4%**
Pocket parks linking up parts of the seafront through play	12.3% (70)	10.2% (27)	**29.4%**
Street furniture and sheltered seating that encourages both sociability and quiet contemplation	17.8% (101)	14.1% (37)	**40.7%**
Playful seating integrated into the landscape	10.9% (62)	11% (29)	**27.7%**
Skate-able landscaping	7.6% (43)	8% (21)	**21.1%**
Other			**14.5%**

Figure 13

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.10 Key findings

As shown previously (Figure 09) when visiting the West Beach/ Beachlands sites, most spent their money on food and drink. However, they also indicated that they would like a better offer, including, perhaps, an indoor/ outdoor food court. Figure 14 shows what kinds of opportunities people are attracted to and are most suited to Hayling Island. Locally sourced food, affordable food and drink, a design which makes the most of the seafront views and an evening menu to activate the seafront at night had the most popular response. Having attractive food and drink options will help to increase the use of the site year-round, without being dependent on the weather.

Many people also expressed that they would like it is be 'dog friendly' as dog walking was one of the most popular activities along the beach front for a wide range of ages groups, families, friends and individuals.

Other comments with regards to F & B offers included:

- Improve existing offer with small interventions **10 comments**
- Existing offer is fine **9 comments**
- Pub e.g. like Belgium beaches **4 comments**
- Vegan **2 comments**
- Health focused menu **1 comment**
- With children's play area **1 comment**
- Street food **1 comment**
- No flashy eateries, keep it natural **1 comment**
- A wider selection than fish and chips **1 comment**

WHAT FOOD / DRINK OPPORTUNITIES DO YOU THINK THE SEAFRONT SHOULD HAVE?

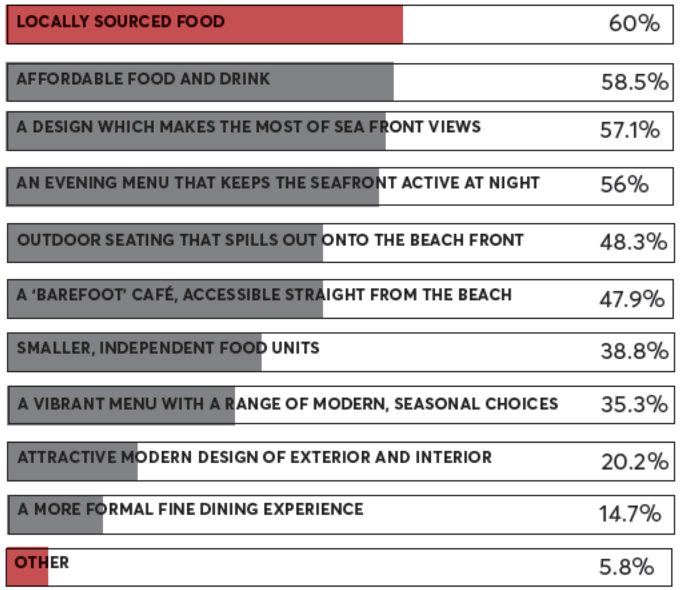


Figure 14

"I would encourage high quality food and drink to eat-in rather than the cheap take-away food that tends to predominate at UK seaside resorts."

-PUBLIC RESPONSE

"The local businesses should be engaged and helped along on any journey of redevelopment. The cafes and kiosks are very dated, but they are people's livelihoods and they should be helped along."

-PUBLIC RESPONSE

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.11 Key Findings

Respondents of the survey were asked how the sea front could provide opportunities for design led regeneration including new homes that inject "beauty" into the existing housing offer. Design features that appealed to them included:

- Natural elements seemed to have a positive impact on respondents.
- Modern take on traditional pitched roof
- Views overlooking the water
- Living space on second floor
  Private outdoor living space on the ground floor
- Large windows to exploit views

The least popular choices were developments that exceeded two storeys, had shared outdoor living spaces and flat roofs rather than the more traditional pointed roof.

THE SEAFRONT COULD PROVIDE OPPORTUNITIES FOR DESIGN LED REGENERATION INCLUDING NEW HOMES, INJECTING "BEAUTY" INTO THE EXISTING HOUSING OFFER.

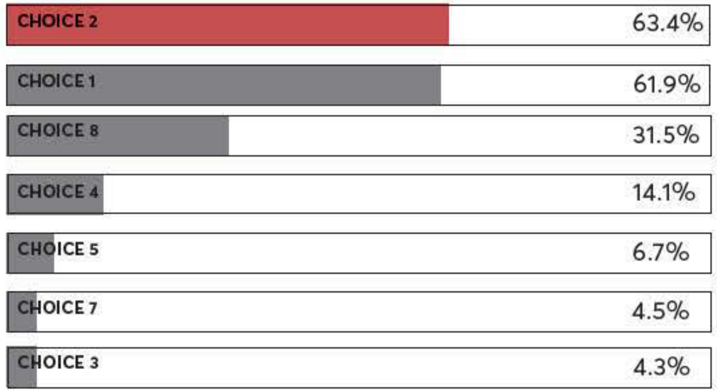


Figure 15

"I believe housing developments should be small-scale, low-rise, high quality and take account of the future flood risks."

-PUBLIC RESPONSE

"What ever is done needs to have some architectural merit. Too much of the architecture is dire."

-PUBLIC RESPONSE

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.12 Key findings

Free comments at the end of the survey were analysed and grouped. The top twelve comment topics are in the opposite table.

The biggest single issue highlighted by 11% of all respondents to the survey, whether they submitted a free text comment or not, was the need to tackle traffic, with many considering this an essential first step before improvements to the seafront or more housing is introduced. Some considered that transport improvements onto the island should take the form of 'off island' based Park and Ride or the introduction of a new cycle and walking route along the former railway route onto the island.

6% of respondents to the survey called for no more residential development. The two key reasons expressed were either based around the lack of infrastructure and traffic congestion suggesting the Island could take no more housing, or a fear that new housing would be built on sensitive green field sites, especially those south of the seafront road leading to insensitive development and loss of coastal views. A number of respondents called for improvements to the existing cycle network, including the Hayling Billy trail, voicing concern that it does not offer a suitable all-weather surface.

TOPIC	NO. OF COMMENTS
Improvements to road access and other infrastructure before investing in tourism:	75 comments
No more housing on Hayling Island, especially on seafront, south of the road	40 comments
Improvements / extensions to cycle and walking paths	20 comments
No development on green spaces, only brown field site	12 comments
No change whatsoever	12 comments
Introduce more for young people	10 comments
Improvements to adopt higher quality design, particularly around housing	9 comments
Reintroduce sand onto the beach	7 comments
Permit campervans / overnight sleeping on the seafront	6 comments
Invest in sea defenses	5 comments
Introduce public transport links to ferry	5 comments
Introduce all weather year round facilities	5 comments

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

3.13 Engagement Meeting

On 28/09/2018, HemingwayDesign, Andrew Emery and Havant Borough Council hosted a brainstorming meeting for stakeholders and local businesses of Hayling Island.
They were invited to learn about what the purpose of the regeneration was, the team's previous projects and what their initial views of the site. Attendees were then encouraged to share their own thoughts about the sites.

Those that attended included local authority members & officers, community representatives, local business and national business with investments in the area.

Task 1

Participants were asked to list their top five strengths and weaknesses of the West Beach and Beachlands sites. This enabled discussion between groups to share ideas to draw more informed and debated conclusions.

The top strengths that participants expressed were:

- Access to nature
- Ample parking
- Sporting heritage
- Safe swimming
- Current facilities available some of which are not known
- Opportunities and space to enhance the current offer
- Weather- less rain and more sun than most of the UK

They listed their most important weaknesses as:

- Transport and congestion issues,
- The existing demographic heavily weighted towards elder generations
- Quality of hospitality offerings
- Communication of amenities and facilities are weak
- Seasonality of leisure options
- Competition of nearby coastal resorts
- Limited food and beverage

APPENDIX F) SURVEY OF SEAFRONT USERS AND STAKEHOLDERS

Task 2

Task 2 was to look at site maps of West Beach and Beachlands and discuss what potential interventions/ opportunities attendees believed would be suitable for the area.

Short stay beach lodges were received positively. They have already started seeing small-scale accommodation already popping up with Airbnb lodgings becoming increasingly popular.

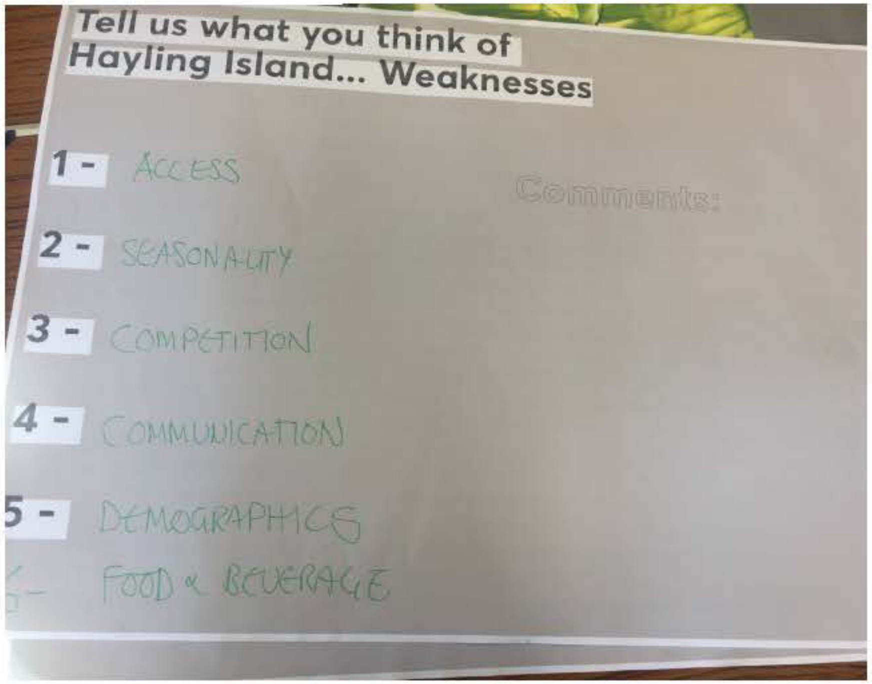
There was a common feeling that there is a lack of high quality leisure options on this site and currently no space for people to go for hospitality across the whole of Hayling Island e.g. conference rooms, events spaces.

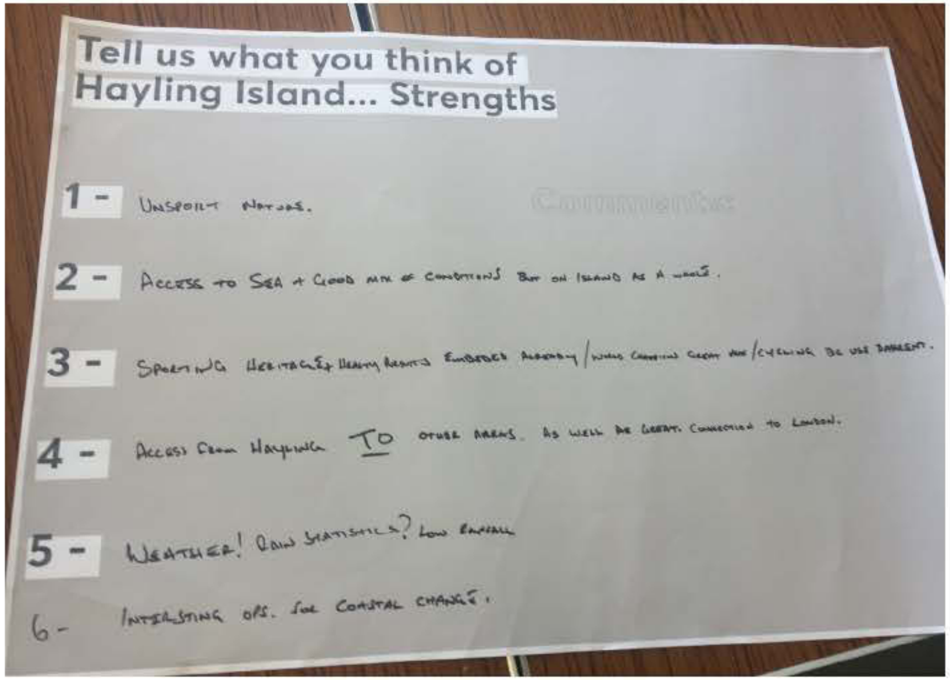
Most would like better F & B offer through the day and an extend evening offer.

There was positive reception for a joined up public furniture which speaks to each other strategy.

There was also a popular belief that Hayling Island already has many facilities and amenities including sports courts, historical interest sites and the Station Theatre. A way-finding or branding strategy could help both residents and tourists to know more about these and bring the islands offer together.

Other key discussion points included: the need for regeneration not to be about simply more visitors but the type of visitors who spend and stay longer, a demand for land and business owners to have more collaboration and for stakeholders together with a clear vision.





APPENDIX G) FUTURE FUNDING OPPORTUNITIES

APPENDIX G) FUTURE FUNDING OPPORTUNITIES

4.1 National policy & future strategic tourism funding opportunities for Hayling Island seafront.

4.1.1 The Government published its Industrial Strategy in November 2017. The strategy aims to address issues affecting low productivity to reduce regional disparities and improve living standards across the country. Re-balancing the economy is a central theme.

4.1.2 The Strategy seeks to address these challenges across five areas:

- Places: Local Enterprise Partnerships working with Local Authorities and business will provide a new opportunity for coastal areas to engage with Government and seek strategic funding support via the existing Coastal Communities Fund and the soon to be announced UK Shared Prosperity Fund.
- Ideas (innovation), focusing on increasing investment in research and development.
- People (skills), focusing on improving the quality of technical education, the shortage of STEM skills, and regional disparities.
- Infrastructure: focusing on more geographically balanced investments to meet global economic trends.
- Business Environment: focusing on spreading best practice, access to finance and skills and the development of Sector Deals between Government and Industry to increase sector wide productivity.

4.2 Access to Grant Funding

4.2.1 **UK Shared Prosperity Fund**

The Government is currently developing the UK Shared Prosperity Fund which is expected to replace access to European funding upon conclusion of BREXIT negotiations. Precise timing is currently uncertain, but it is anticipated that the new fund will eventually replace the £4.6bn ERDF and £3.9bn ESF funds. Alignment with a successor for Local Growth Funding is also being considered. The UK Shared Prosperity Fund may present significant opportunities to access investment for Hayling Island in the future.

4.2.2 **Coastal Communities Fund**

The UK Government launched the Coastal Communities Fund (CCF) and Coastal Revival Fund (CRF) in 2012 to support sustainable economic growth and job creation in coastal areas. Since 2012, 218 grants have been awarded across the UK coastline worth £125 million. This funding has been forecast to deliver over 18,000 jobs and attract a further £240 million of additional funding. Many of the investments have gone into regenerating coastal infrastructure and leisure amenities, providing a significant new source of investment for coastal tourism. The fund has currently been extended to 2021, but no new rounds of funding have yet been announced. Expressions of interest for the current round of funding have closed. Funding derives from a proportion of the profits generated by the Crown Estate.

4.2.3 Critical to success in securing CCF funding is the ability to clearly link proposals to a strategic plan that the whole community has signed up to. Economic job creation and productivity assessments need to be clearly evidenced and projects need to be sufficiently developed in order to provide cost certainty and deliverability within a narrow funding window, typically 2 years. In addition, Government prioritises proposals that have the support of the local Coastal Community Team, a network of 118 forums set up across the UK's coast in 2015 to bring together local residents, business and local authorities.

4.2.4 **Department for Environment, Food and Rural Affairs (Defra) Flood Defence Grant-in-Aid**

Defra's policy position is that the beneficiaries of flood risk management should contribute directly to its costs rather than relying on 100% central Government grants. This policy was enshrined in the Pitt Review, although this review considered only surface water flooding. Defra has, in effect, extended the principle from inland flood risk management to coastal defence, which tends to be much greater in scale, cost and impact in the event of failure. In line with this, the Government's Autumn 2017 budget announced an additional £76m to be spent on flood and coastal defence schemes over the next three years. Of this, £40m will be focused on deprived communities at high flood risk, boosting local regeneration (CCA 2018).

4.2.5 DEFRA's LEADER fund is designed to support rural businesses to create jobs and support the rural economy. Small and medium sized businesses can seek funding of up to £180,000 provided the projects contribute to one or more of 6 national priorities which include support for rural tourism and supporting cultural and heritage activities. Hayling Island falls within the area covered by this grant scheme. A total fund of £138m is available for the whole of England and runs between 2015 and 2020.

4.2.6 **National Lottery**

Heritage Lottery and Sport England grants should be explored to fund improvements. Most of these grants require an element of matched or contributory funding. With significant opportunities to improve the seafront with interpretation of the historic environment, potential restorations of historic buildings and structures and the development of inclusive active sport amenities, these two sources of funding could make a critical difference.

4.2.7 **Commercial investment**

Based on the evidence within this report and examples from Local Authorities elsewhere on the South Coast, there is potential for Havant Council to investigate developing overnight accommodation on the seafront generating a commercial investment return for the Council. Alternatively, a development brief could be put together and market tested to secure private sector investment, with a lower rate of rental return to the Council.

APPENDIX H)
SUSTAINABILITY OPTIONS APPRAISAL

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

5. Sustainability options appraisal

5.1 Approach to Sustainability Appraisal

5.1.1 This sustainability appraisal is based upon criteria set out by Havant Borough Council in their Sustainability Appraisal Scoping Report, June 2016. In the Scoping Report the identification of sustainability issues have been presented through a series of sustainability themes. These themes incorporate the required topics listed in the Strategic Environmental Assessment (SEA) Directive as well as other topics identified as being of significance in the borough, so that a broad and effective range of sustainability themes are covered by the appraisal process. The selected sustainability themes incorporate the SEA topics derived from Annex I(f) of the SEA Directive.

5.1.2 The sustainability appraisal considers three alternative proposals:

1. The proposals outlined in this report (recommended option)

2. Maintenance and minimal investment in existing facilities (maintaining the status quo)

3. Do nothing (assumes Local Plan is not adopted)

5.1.3 The sustainability appraisal predicts and evaluates the effects of the three options against the baseline environmental, economic and social characteristics of the area based on the evidence base presented in this report. The appraisal also sets out the key reasons the alternatives were selected, the reasons the rejected options were not taken forward and the reasons for selecting the preferred approach in light of the alternatives.

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

5.2 Sustainability Appraisal assessment criteria

SUMMARY OF SUSTAINABILITY APPRAISAL OBJECTIVES & ASSESSMENT CRITERIA	
ISSUE & SUSTAINABILITY	ASSESSMENT CRITERIA: "WHAT CONTRIBUTION DOES THE PROPOSAL MAKE TO..."
1. Natural Resources & Climate Change: To protect the quality and minimise the consumption of natural resources, and minimise emissions to address the causes of climate change	Minimising the need to travel?
	Reducing the reliance on, and the consumption of, finite fossil fuels in transport and reducing emissions?
	Reducing the reliance on, and the consumption of, finite fossil fuels through energy efficiency in development?
	Improving air quality?
	Reducing final disposal of waste, including avoiding waste, re-using and recycling?
	Reducing the extraction of minerals and increasing the use of recycled aggregate?
	Maintaining and enhancing water quality?
	Conserving water resources?
	Re-using brownfield land, vacant sites and buildings?
	The density of development?
2. Flood Risk: To reduce flood risk from all sources of flooding	Avoiding development in flood risk areas?
	Managing flood risk on sites at risk of flooding?
	Minimising the impact of development on the island's sewer system?
3. Biodiversity: To make sure that the seafront's most important wildlife species and habitats are protected and enhanced	Maintaining and / or improving the condition of internationally, nationally and locally designated nature conservation sites?
	Safeguarding the role of non-designated sites in supporting wildlife on the island?
4. Landscape & Townscape Quality: To preserve and enhance the character and appearance of Hayling Island seafront and its surroundings, including its built-up areas and its open spaces	The quality / appearance of the built environment?
	Fostering positive perceptions of the seafronts attractiveness?
	To protecting and enhancing sea views, by improving the quality and quantity of open spaces?
5. Heritage: To protect and conserve Hayling Island's seafront heritage	Maintaining and protecting conservation areas?
	Maintaining and protecting listed buildings and scheduled ancient monuments and their settings?
6. Homes for Everyone: To ensure that good quality housing is readily available and attainable to all those who need it	Delivering sufficient housing numbers to fund improvements to leisure and the public realm?

	Delivering sufficient affordable housing units to satisfy the needs of those on lower incomes?
	Ensuring an appropriate mix and balance of housing types and tenures across the seafront?
	Promoting good quality homes that will stand the test of time?
7. Education, Employment & Economy: To ensure that Hayling Island's tourism economy is buoyant and diverse, and to develop and maintain a skilled workforce to support long-term competitiveness	Employment levels?
	Supporting new and existing businesses?
	Economic growth?
	Maintaining and enhancing the appeal of Hayling Island's visitor attractions?
	The provision of adequate education & training facilities?
	Creating opportunities to increase the skills level of the local population?
8. Health & Wellbeing: To promote standards of health within the city's population and to make Hayling Island seafront a place where everyone feels safe and is safe	Improving people's perception of their own health?
	Improving the health of the island's population?
	Increasing opportunities for healthy pursuits including improved access to and across the seafront?
	Reducing Health inequalities?
	Reducing danger to all road users and the potential for accidents?
	Reducing the fear of crime and anti-social behaviour?
9. Culture, Leisure & Recreation: To ensure that there are opportunities for everyone to participate in fulfilling healthy and rewarding leisure activities to suit a full range of needs and interests	Ensuring that everyone has easy access to pleasant, multi-functional public spaces and facilities across the seafront that appeal to all age groups?
	Ensuring that the island maintains adequate leisure and entertainment facilities to satisfy residents' and visitors expectations
10. Social Inclusion & Quality of Life: To minimise unfair disadvantage or discrimination, so that all people in the city have equal access to facilities & services, feel part of a community and have a sense of pride in Portsmouth	Maintaining the role of the seafront as a place for leisure and enjoyment and ensuring its continued vitality and viability?
	Ensuring that as many people as possible have good access to the beach and facilities across the seafront?

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

5.3 Determinants of health (Bold denotes those most relevant to this seafront sustainability appraisal)

LIFESTYLE	PERSONAL CIRCUMSTANCES	ACCESS TO SERVICES, FACILITIES AND AMENITIES
•Diet **•Exercise and physical activity** •Smoking habit •Exposure to passive smoking •Alcohol intake •Dependency on prescription drugs •Illicit drug and substance use •Sexual behaviour •Other health-related behaviours, such as tooth-brushing, bathing, and food preparation **•Travel choices** **•Where you work in relation to where you live**	•Structure and cohesion of family unit •Parenting •Childhood development •Life skills •Personal safety •Employment status **•Working conditions** **•Level of income, including benefits** •Level of disposable income •Housing tenure **•Housing conditions** •Educational attainment •Skills levels including literacy and numeracy	**•to Employment Opportunities and Workplaces** **•to Housing** **•to Shops (to supply basic needs)** **•to Amenities (e.g. bank, Post Office)** **•to Community facilities** **•to Public transport** **•to education, training and skills development** **•to Healthcare** **•to Social Services** **•to Childcare** **•to Respite Care** **•to Leisure and recreation services and facilities, including open space**
SOCIAL FACTORS	**ECONOMIC FACTORS**	**ENVIRONMENTAL FACTORS**
•Social contact •Social support **•Social cohesion** **•Neighbourliness** **•Participation in the community** •Membership of community groups **•Reputation of community/ area** •Participation in public affairs **•Level of crime and disorder** **•Fear of crime and disorder** **•Level of antisocial behaviour** **•Fear of antisocial behaviour** •Discrimination •Fear of discrimination •Public safety measures **•Road safety measures**	**•Creation of wealth** **•Distribution of wealth** **•Retention of wealth in local area/ economy** **•Distribution of income** **•Business activity** **•Job creation** **•Availability of employment opportunities** **•Quality of employment opportunities** **•Availability of education opportunities** **•Quality of education opportunities** **•Availability of training and skills development opportunities** **•Quality of training and skills development opportunities** **•Technological development** **•Amount of traffic congestion**	**•Air quality** **•Water quality** **•Soil quality/ Level of contamination** **•Noise, odour, vibration levels** **•Hazards** **•Land use** **•Natural habitats and Biodiversity** **•Landscape, including green and open spaces** **•Townscape: civic areas and public realm** **•Use/ consumption of natural resources** **•Energy use: CO2/ other greenhouse gas emissions** **•Solid waste management** **•Public transport infrastructure** **•Active travel infrastructure** **•Flood Risk**

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

5.4 Sustainability Appraisal of Option 1:
(recommended option)

KEY TO SCORING	
POSITIVE	Where the option is certain to have a positive impact on the sustainability objectives
POSSIBLE POSITIVE	Where the option is likely to have a positive impact, but where there is some uncertainty
UNCERTAIN	Where the effect of the option on the sustainability criterion is uncertain, or where there are both positive and negative effects, thereby making the overall effect uncertain
POSSIBLE NEGATIVE	Where the option is likely to have a negative impact, but where there is some uncertainty
NEGATIVE	Where the option is certain to have a negative impact on the sustainability criterion
N/A	Where there is no direct relationship between the option and the criterion or the option has only a very minor impact on the criterion

OPTION 1: THE PROPOSALS AS SET OUT IN THIS REPORT (SECTION 9) RECOMMENDED OPTION			
SUSTAINABILITY OBJECTIVES	CONTRIBUTION TO SA OBJECTIVE	REASON TO SCORE	CHANGES TO MASTERPLAN/ MITIGATION MEASURES INCLUDED
1 Natural Resources & Climate Change	Positive	Proposals to improve wayfinding and cycle/ walking/running route connecting Hayling Billy and across seafront will improve appeal and access, reducing carbon impact. Leisure attractions designed to encourage visitors to stay longer (overnight accommoda-tion) and extend season (water sport facilities), reducing seasonality and increasing efficient use of resources Potential to introduce renewable energy within residential and leisure developments New residential development limited to brownfield sites. Density of residential development appropriate in scale to location and surrounding area. Use of natural materials, eg; reclaimed timbers, within public realm to reduce waste and increase recycling.	No change

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

Sustainability Objectives	Contribution to SA objective	Reason to score	Changes to masterplan/ mitigation measures included
2 Flood Risk	Positive	No objective to reduce flood risk. But relocation of beach huts designed to minimise impacts of flood risk and coastal erosion through managed re-alignment. Enabling residential development clustered around areas already protected by coastal defence or less susceptible to flood risk.	No change
3 Biodiversity	Positive	Proposals concentrate active development to existing brownfield sites whilst improving interpretation and access to designated nature conservation sites. Re-opening up of views in places to enhance habitats and reconnect the landscape to the beach.	No change
4 Landscape & Townscape Quality	Positive	High quality residential and built leisure facilities reinforcing a strong sense of place. Appropriate scale of development that is not overbearing or out of scale with existing built environment. Protection and enhancement of existing green spaces. Refocused and branded leisure offer designed to appeal to new audiences, fostering and extending positive perceptions of Hayling Island.	No change
5 Heritage	Positive	Appropriate and limited scale to development that does not detract from existing listed buildings and local heritage assets and conservation areas.	No change
6 Homes for Everyone	Positive	Balanced mix of proposed residential ranging from apartments, terraced, semi-detached and detached properties between 2 and 5 beds. Appealing to working families, redressing population imbalance. High quality designed properties, sensitive to the landscape and designed to last.	No change

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

Sustainability Objectives	Contribution to SA objective	Reason to score	Changes to masterplan/ mitigation measures included
7 Education, Employment & Economy	Positive	Creation of new commercial leisure business space and flexible event space design to attract new start-ups and independent businesses. Refresh to overall leisure offer designed to appeal to modern visitor and resident requirements, helping to sustain and expand local tourism industry including balancing off current high levels of seasonality with year-round offer (overnight stay accommodation, water sports, leisure retail and restaurant/ café). Refocus of leisure offer to key hub sites, improving viability of leisure offer. Sustainable delivery of new facilities through appropriate level of enabling residential development.	No change
8 Health & Wellbeing	Positive	Improving accessible routes to seafront, beach and facilities through upgrade to pathways, cycle routes, wayfinding signage, shelters and seating. Providing opportunities to resident population of all ages to stay fitter and more active. Water sports centre providing new opportunities for participation in sports. Improvements to shared-surfacing around proposed leisure hub at Eastoke and re-configuring of car parking helping to reduce danger to all road users. New forms of on site short-stay accommodation providing opportunities urban-dwellers within the sub-region to access and enjoy the seafront year-round. Breathing new life into run down facilities, creating a relaxed family-friendly space that is safe year round.	No change

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

Sustainability Objectives	Contribution to SA objective	Reason to score	Changes to masterplan/ mitigation measures included
9 Culture, Leisure & Recreation	Positive	Improved access to green-spaces, natural planting enhancement and interpretation of protected habitats and improvement of view to sea through re-location of beach huts and parking all designed to enhance experience of seafront for residents and visitors. New range of sustainable leisure facilities designed to appeal to modern audience, increase year-round use and access and create an appealing family-friendly vibe in the evenings in proposed areas of mixed-use leisure and residential.	No change
10 Social Inclusion & Quality of Life	Positive	Creating sustainable new leisure and mixed-use development that will appeal to all age groups and budgets from specialist water sports provision to a balanced mix of affordable and free to access leisure facilities on the seafront with a range of quality food and beverage offers from 'on the go' and temporary seasonal based to permanent cafes and year-round restaurant facilities. Mixed use residential developments located close to existing shops and amenities and transport access with new leisure on the doorstep.	No change

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

5.5 Sustainability Appraisal of Option 2:

KEY TO SCORING	
POSITIVE	Where the option is certain to have a positive impact on the sustainability objectives
POSSIBLE POSITIVE	Where the option is likely to have a positive impact, but where there is some uncertainty
UNCERTAIN	Where the effect of the option on the sustainability criterion is uncertain, or where there are both positive and negative effects, thereby making the overall effect uncertain
POSSIBLE NEGATIVE	Where the option is likely to have a negative impact, but where there is some uncertainty
NEGATIVE	Where the option is certain to have a negative impact on the sustainability criterion
N/A	Where there is no direct relationship between the option and the criterion or the option has only a very minor impact on the criterion

OPTION 2: MAINTENANCE AND MINIMAL INVESTMENT IN EXISTING FACILITIES (MAINTAINING THE STATUS QUO)			
Sustainability Objectives	Contribution to SA objective	Reason to score	Changes to masterplan/ mitigation measures included
1 Natural Resources & Climate Change	Possible negative	Limited or no investment in alternative transport and cycle access routes lead to no improvements in air quality or consumption of fossil fuels. Development likely limited to brownfield sites, maintaining natural habitats.	No change
2 Flood Risk	Negative	Existing beach huts and access routes at western end to be relocated over time due to coastal erosion, likely lead to loss of access to beach, limited informal leisure opportunities.	No change
3 Biodiversity	Uncertain	Existing biodiverse landscapes likely to be maintained but not enhanced. Negative impact on surrounding habitats of inappropriate development on non-designated sites could be a high risk.	No change

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

Sustainability Objectives	Contribution to SA objective	Reason to score	Changes to masterplan/ mitigation measures included
4 Landscape & Town-scape Quality	Negative	Continued erosion of tourism/ leisure appeal of outdated leisure offer leads to lack of reinvestment, eventual closure and high risk of inappropriate redevelopment eg: funland site.	No change
5 Heritage	Uncertain	No enhancement of existing conservation and heritage features, only continued maintenance of existing facilities, some of which are of poor or inappropriate quality.	No change
6 Homes for Everyone	Possible negative	Lack of investment in leisure offer on seafront could lead to closure of Funland and high risk of re-development that do not meet the needs of a sustainable community or enhancement of the appeal of the seafront to visitors.	No change
7 Education, Employment & Economy	Possible negative	Maintenance of existing facilities does not reverse declining appeal of key sites, leading to job loss. Informal leisure use of seafront is maintained in so far as it is possible to maintain physical access to the beach and sites with limited resources.	No change
8 Health & Wellbeing	Uncertain	Improvements to access and opportunities for healthy pursuits is limited, but overshadowed by lack of new amenities to make the step change to help an increasingly elderly population. Eg: no funding to improve access routes, introduce shelters, cycle racks or sporting facilities. Continued decline in visitor numbers and working population coupled with an increasingly elderly population may lead to further viability pressures on essential services such as bus routes, public toilets, etc.	No change

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

Sustainability Objectives	Contribution to SA objective	Reason to score	Changes to masterplan/ mitigation measures included
9 Culture, Leisure & Recreation	Possible negative	Accessible green spaces maintained, with some limited free to access leisure facilities. Range of facilities and quality of offer increasingly finds it hard to reach an audience as resident and visitor expectations change. Viability of maintaining facilities becomes questionable in the long run.	No change
10 Social Inclusion & Quality of Life	Uncertain	Insufficient concentration of investment to deliver step change and support long term vitality of seafront area. Potential for increasing social disadvantage.	No change

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

5.6 Sustainability Appraisal of Option 3:

KEY TO SCORING	
POSITIVE	Where the option is certain to have a positive impact on the sustainability objectives
POSSIBLE POSITIVE	Where the option is likely to have a positive impact, but where there is some uncertainty
UNCERTAIN	Where the effect of the option on the sustainability criterion is uncertain, or where there are both positive and negative effects, thereby making the overall effect uncertain
POSSIBLE NEGATIVE	Where the option is likely to have a negative impact, but where there is some uncertainty
NEGATIVE	Where the option is certain to have a negative impact on the sustainability criterion
N/A	Where there is no direct relationship between the option and the criterion or the option has only a very minor impact on the criterion

OPTION 3: DO NOTHING (ASSUMES LOCAL PLAN IS NOT ADOPTED)		
Sustainability Objectives	Contribution to SA objective	Reason to score
1 Natural Resources & Climate Change	Negative	Outdated facilities, reducing access and loss of critical mass of visitors leads to closure and reduction in visitor traffic balanced by loss of employment leading to more resident traffic heading off the island. Inappropriate development on greenbelt and sensitive environmental sites due to lack of Local Plan.
2 Flood Risk	Negative	With fewer employment opportunities an aging population and high pressure on social services there would potentially be declining investment left to maintain or improve basic infrastructure. Lack of Local Plan likely to lead to inappropriate and un-regulated development, particularly when existing leisure facilities reach the end of their economically viable life. Increasing flood risk due to lack of funds to maintain coastal protection.

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

Sustainability Objectives	Contribution to SA objective	Reason to score
3 Biodiversity	Possible negative	Inappropriate development on biodiverse sites due to lack of Local Plan adoption. Non-designated sites not protected from redevelopment.
4 Landscape & Townscape Quality	Possible negative	Unregulated development of inappropriate size and scale. Loss of 'place' identity through un-coordinated development and leading to loss of opportunity. Lack of brand identity and appeal for seafront, leading to further erosion of tourism market, ultimately beyond the point of 'no return'.
5 Heritage	Possible negative	In appropriate development impacting on conservation areas and listed structures. Listed structures at risk.
6 Homes for Everyone	Negative	Inappropriate, poor quality housing development likely to come forward. Unappealing to new working-age families
7 Education, Employment & Economy	Negative	Continued decline and erosion of tourism appeal on seafront due to outdated amenities and attractions. Likely to lead to further employment loss and opportunities, beyond the point at which they can be recovered.
8 Health & Wellbeing	Negative	Diminishing access to beach and coast through lack of co-ordinated investment in paths and trackways, some of which will be lost to coastal change eg: Hayling Billy trail. Increasing health inequality. Decline in use of existing leisure facilities could lead to closure, abandonment and increasing anti-social issues and fear of safety

APPENDIX H) SUSTAINABILITY OPTIONS APPRAISAL

Sustainability Objectives	Contribution to SA objective	Reason to score
9 Culture, Leisure & Recreation	Negative	With no co-ordinated plan, existing facilities continue to loose appeal and lack of 'things to do' or declining access to natural environment leads to critical mass loss of visitors. Residents look 'off island' for leisure facilities.
10 Social Inclusion & Quality of Life	Negative	Unregulated development of inappropriate size and scale. Loss of 'place' identity through un-coordinated development and leading to loss of opportunity. Lack of brand identity and appeal for seafront, leading to further erosion of tourism market, ultimately beyond the point of 'no return'.