

Main Centres Survey 2018

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Introduction

As the island's main economic and residential centres, St Peter Port (Town) and St Sampson/Vale (the Bridge) serve a wide variety of functions and, in accordance with States Strategic objectives, are the main focus of development on the island. As such, it is important that they remain attractive places in which to live, work and spend leisure time.

The extent of the two Main Centres is defined, in planning terms, in the Island Development Plan (2016) (IDP) which contains the detailed planning policies for the island. The IDP is a statutory document which was adopted by the States of Deliberation (the States) in November 2016. There is a requirement that all planning policies are monitored in order to assess their effectiveness in delivering both the objectives of the IDP and the strategic objectives of the Strategic Land Use Plan, 2011 (SLUP)¹, as well as the priorities of the States as set out in the Future Guernsey Plan (formerly the Policy and Resources Plan) 2017 and the purposes of the Land Planning and Development (Guernsey) Law, 2005.

This Main Centres Survey 2018 reports on the 'health' of the two Main Centres, and forms part of the monitoring of planning policies as described above. The report is informed by research and surveys and includes the findings of an annual retail audit and building condition survey carried out in late August and early September 2018, as well as reporting on public realm, accessibility and other relevant issues that relate to Main Centre policies.

This is the second annual Main Centres report. The 2017 report (published August 2018) establishes a baseline of information and evidence against which to assess change and trends over time, and this second report includes tentative commentary on initial trends identified. However, given the short period of time being reported on, the analysis of trends is very limited and should be considered with caution.

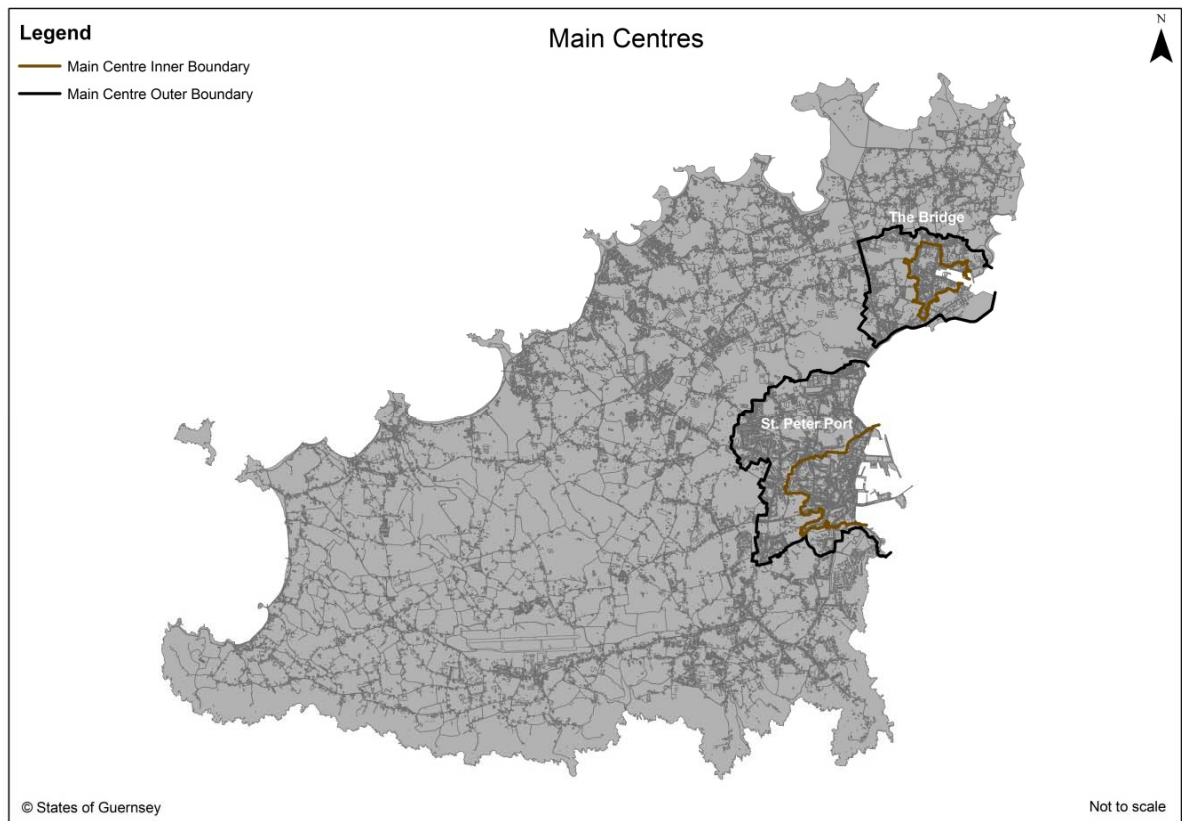
Policy Context

The SLUP, with which the IDP must be consistent, sets out the spatial strategy for the island which is to concentrate development within and around the edges of the urban centres of St Peter Port (Town) and St Sampson/Vale (the Bridge). The SLUP policies focus on enhancing vitality and viability of Town and the Bridge by encouraging a wide range of retail, commercial, leisure, business, culture and arts facilities, as well as residential uses. It sets out that the scale of provision within each Main Centre should be such that Town is maintained as the Island's primary retail centre.

Emphasis is placed on respecting the quality of the physical environment and historic character, particularly the historic core of St Peter Port, as well as on improving public space, balanced with making provision for appropriate development to ensure the Main Centres are able to accommodate the needs of modern commercial operations. Re-use of vacant buildings and improving pedestrian and cycle access are also policy objectives.

¹ The SLUP is a statutory document prepared by the States of Guernsey which sets out the high level strategic spatial planning framework and strategic land use objectives of the States. It guides and directs the Development and Planning Authority (DPA) in the preparation of development plans and detailed land use policies. The IDP must be consistent with the SLUP. See Billet d'Etat XIX of 2011, Article X.

These themes are reflected in the IDP, where policies seek to concentrate the majority of new development in the Main Centres and Main Centre Outer Areas, placing an emphasis on maintaining and enhancing the vitality and viability of the two Main Centres and ensuring, through its policies, that this is not undermined by development Outside of the Centres. **Map 1**, below, shows the location of the two Main Centres, with the Main Centre Outer and Inner Areas defined.



Map 1: Location and extent of St Peter Port and St Sampson/Vale Main Centres

Town and the Bridge each have their own unique character which reflects both their more recent and also their historic roles on the island. Particularly in St Peter Port, the character is underpinned by the attractive historic environment, which is in itself a major attraction of the island. The IDP aims to balance the conservation of the historic environment with promoting economic investment. As such, careful consideration will be given to the economic and social value of proposed development which involves historic buildings and the contribution of development to enhancing the vitality of the Main Centres. These two factors are not mutually exclusive, however, and particularly in the Regeneration Areas, a co-ordinated, focused and positive approach to development aims to attract inward investment in the Main Centres to provide economic, social and environmental improvements, informed by understanding the character and quality of the built heritage.

The IDP states that the concept of ‘vitality and viability’ is central to maintaining and enhancing town centres. This concept is dependent on many factors, including the range and quality of activities in a centre, mix of uses, accessibility to people living and working in the area, and general amenity, appearance and safety. Generally speaking, vitality is

considered to be a measure of how busy a centre is, whereas viability is a measure of its capacity to attract ongoing investment, its importance, and the ability to adapt to changing needs.

Both vitality and viability will depend on factors such as:

- the diversity of uses and purposes within the centre;
- the level of footfall and the accessibility of the centre;
- the level of occupied versus vacant space;
- the quality of buildings and space;
- the popularity of the centre with those who live, work or visit there.

Monitoring of vitality and viability should therefore encompass both quantitative and qualitative data.

Main Centre Policy Designations

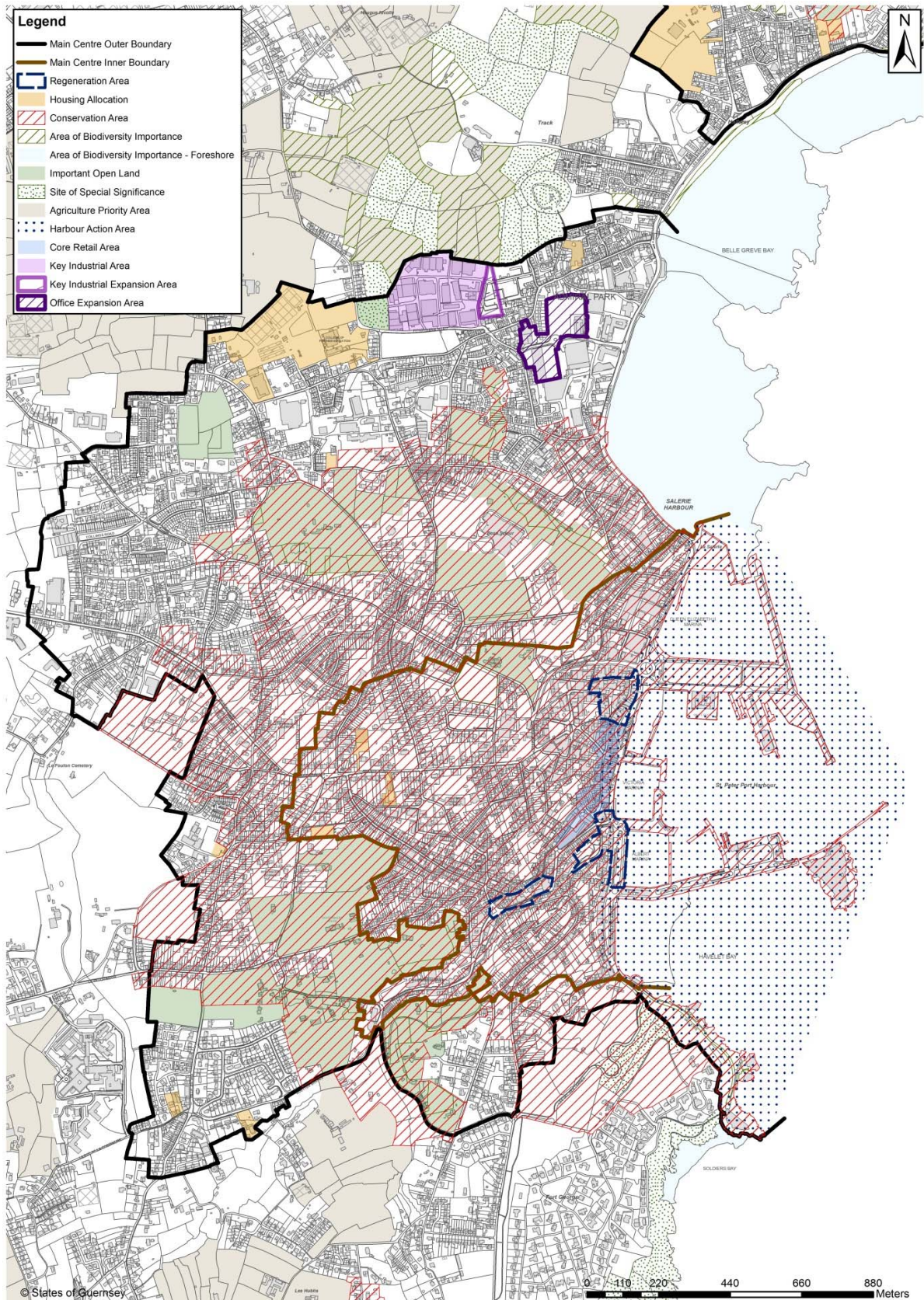
Within the Main Centres there are several policy designations which guide development. The designations that are of particular relevance to this report are as follows:

- In the **Main Centre Outer Areas**, a range of new development will be supported where it would not detract from the objective of ensuring the Main Centres remain the core focus for economic and social growth. Policies allow for new convenience retail (and limited works to existing comparison retail outlets) to ensure that the Main Centre Inner Areas remain the core focus for economic and social growth as directed by the SLUP. These areas are predominantly residential, although the Key Industrial Areas also fall within the Main Centre Outer Areas.
- The **Main Centre Inner Areas** are mixed use areas but they do not have the retail focus of the Core Retail Areas (see below), or need a comprehensive approach to development as in the Regeneration Areas or Harbour Action Areas. Outside of the Core Retail Areas policies provide flexibility to change away from retail use where it supports the objective of ensuring the Main Centres remain attractive focal points for economic and social activity.
- In the **Core Retail Areas** planning policy favours the retention of retail uses and the addition of new shops. On upper floors, change of use away from retail is generally supported where the proposed new use would contribute to the vitality and viability of the Core Retail Area.
- The **Regeneration Areas** present opportunities for new sustainable place making, attracting inward investment and making improvements to, and enhancement of, the public realm and historic environment.
- **Harbour Action Areas** have been identified where a co-ordinated approach to mixed use development is supported, recognising the potential opportunities for development and securing significant inward investment, as well as improvement of the appearance and accessibility of public places.
- Within the Main Centres and Main Centre Outer Areas there are areas of **Important Open Land**, designated as such as they provide breathing space within the built environment and in most cases offer views across undeveloped land. They have been recognised as important to protect to provide visual amenity, separation between settlements and prevent the potential wholesale development of the Main Centres and Main Centre Outer Areas

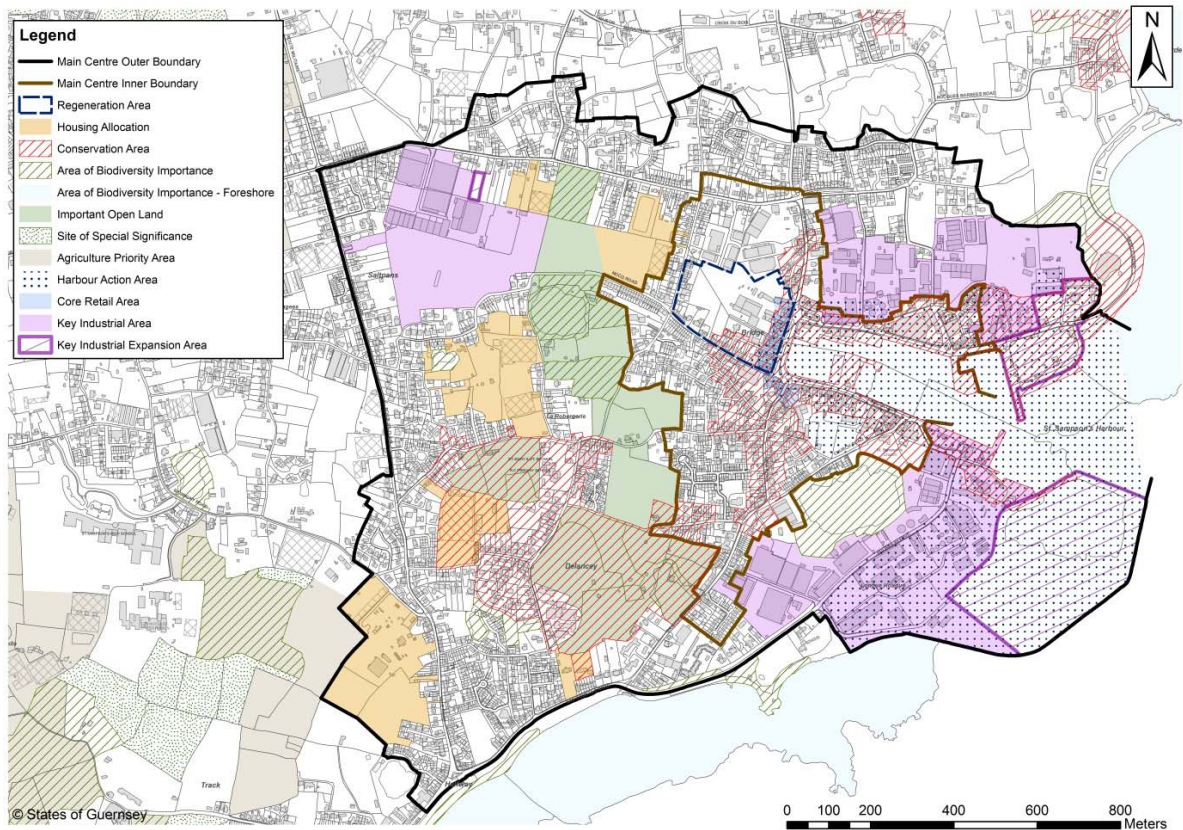
Other policy designations in the Main Centres and Main Centre Outer Areas include Housing Allocations, Key Industrial Areas, Key Industrial Expansion Areas, and the Admiral Park Office Expansion Area. These designations have a different policy focus and are monitored separately, and are not specifically explored in the research and surveys relating to the Main Centres. The purposes of the designations are as follows:

- **Housing Allocations** are sites which are designated specifically for housing development and complementary facilities where appropriate
- **Key Industrial Areas and Key Industrial Expansion Areas** serve to encourage clustering of industrial type uses and allow for further expansion if needed.
- The **Admiral Park Office Expansion Area** is designated as such to allow redevelopment of the area primarily for large floor plate office accommodation.

Maps 2 and 3 show the policy designations as defined in the IDP as they apply to both Town and the Bridge.



Map 2: Extract from the IDP Proposals Map showing the Main Centre policy designations relating to St Peter Port



Map 3: Extract from the IDP Proposals Map showing the Main Centre policy designations relating to St Sampson/Vale

Whilst the same policy context applies to both of the Main Centres, Town and the Bridge each have their own unique character which reflects their more recent and also their historic roles on the island. The Visions exercise carried out in 2012 highlighted these differences and was used to inform the IDP. The research and survey information presented in this report aims to capture some of these differences by considering the diversity of uses, the quality of the public realm and other variables. Flexibility in the IDP policies allows those differences to be brought into the balance, for example what might contribute to the vitality of the Bridge might differ to what might contribute to the vitality of Town, depending on the existing diversity of uses or quality of the public realm, for example.

Aims and Methodology

The primary aim of the annual Main Centres survey and research is to record information that, when considered in context, provides evidence on Main Centre vitality and viability to ensure that the IDP policies are performing as intended. It will be used to record change in the Main Centres and Main Centre Outer Areas year to year.

Methods used for this report are set out in full in [Appendix 1: Research Tools and Techniques](#), which describes the techniques used and illustrates which were applied to each policy designation. As described above, the primary purpose of the research is to provide evidence against which the effectiveness of planning policy can be monitored. Therefore, a

brief 'policy relevance' is noted against each of the techniques for clarity of purpose. These research techniques can be summarised as follows:

- Use survey
- Goad categorisation
- Building condition survey
- Opening hours
- Façade activation²
- Public Realm survey³
- Footfall counts
- Stakeholder feedback
- Data mapping

In relation to gathering data on uses, it is the primary use that is recorded. Where there is no clear primary use, or where the unit or building has more than one main use, it is recorded as mixed use. For clarity, the use assigned to a building in this survey does not necessarily indicate the legal use class assigned to a unit, but follows a general categorisation which reflects the Land Planning and Development (Use Classes) Ordinance 2017. This is because the use of each unit is ascertained during the site survey, and not through assessment of historic planning application data, and is based on the perceived primary use on site.

The breakdown of uses presented in this report is by number of units rather than the number of occupiers unless otherwise stated (for example some occupiers may take up more than one unit, such as Beghins shoe shop in Town (now vacant but still occupied at the time of survey)). This better represents the character of Guernsey's high street which is largely made up of smaller floorplate units.

The façade activation study was trialled in 2017 on a sample section of Town and the Bridge. This year, the survey was carried out in both Core Retail Areas and all of the Regeneration Areas. Buildings are given a rating based on criteria which are set out in full in **Appendix 2: Façade Activation Ratings**, which range from 1: Vibrant to 4: Inactive and there is an additional category of 5: Monument.

The building condition rating is, as with the Façade Activation rating, open to subjective assessment but this is reduced as much as possible by using a series of criteria against which to assess. Nonetheless a different surveyor on a different day may have found different results, and it does represent a snapshot in time.

Regarding stakeholder feedback, a number of representative organisations and groups were asked to submit feedback as part of the monitoring of the IDP. Where comments relate to the Main Centres, these have been embedded in this report. For clarity, it was not

² The Façade Activation survey used techniques from the Gehl Public Life Tools. More information can be found at <https://gehl.institute.org/public-life-tools/>

³ Public Realm surveys used techniques from the Gehl Public Life Tools. More information can be found at <https://gehl.institute.org/public-life-tools/>

considered feasible or appropriate to conduct widespread public consultation for a technical evidence report, which is something that would be undertaken as part of a full IDP review or new Development Plan, for example, but it was hoped that by contacting representative organisations that a cross-section of views have been gathered. However, there was a very limited response in relation to the Main Centres and it may be appropriate to consider other opportunities for feedback in 2019.

Stakeholder feedback in 2017 indicated that people were dissatisfied with the public realm in both Town and the Bridge, so this 2018 Main Centre Survey expands on the public realm findings to explore this further in line with SLUP policy of encouraging the improvement of public areas.

Main Centre Findings

The Main Centre findings are presented below by Main Centre and by policy area, starting with Town. There is a brief overview of the Centre, followed by a review of the evidence relating to accessibility. Context is given by first exploring the Main Centre Outer Areas and Main Centre Inner Areas before discussing the Harbour Action Areas, Regeneration Areas and Core Retail Areas.

Please note that the colours used in the maps do not correspond to those used in the figures though the categories remain consistent throughout.

St Peter Port (Town)

St Peter Port is the largest of the two Main Centres on the Island and is the island's primary retail centre. The Town Core Retail Area covers the Market Buildings and Market Square, the Arcade and High Street. Three Regeneration areas cover the area around the Lower Pollet; South Esplanade & Mignot Plateau; and Mansell Street/Le Bordage.

As noted there were less sources of feedback this year on which to make assessments of the experience of Town according to residents and visitors, but it was notable that Guernsey won, for the third time, a prestigious 'Cruise Critic UK Editors' Picks award⁴ which is an indication of the Island's appeal with visitors. Other potential sources of information to assess this area are future Community surveys, and Cruise Visitor Surveys. Any updated sources of information will be considered in future reports.

The Better Life Indicators Report was published in early 2019 which provides some feedback on the Island. This report is intended to monitor progress against the States' vision for Future Guernsey based on a series of indicators. Whilst this reflects on Guernsey as a whole (rather than Town or the Bridge specifically) it enables change to be tracked over time and for comparison with other jurisdictions. The best performing jurisdiction is scored 10 and the worst 0, with other jurisdictions scored based on their relative position. In this first report to include Guernsey, it scores as follows for each of the key themes of the Policy and Resource Plan:

- 9.4 for Our Economy
- 7.0 for Our Quality of Life
- 7.4 for Our Place in the World
- Surveys to collect data for Our Community are underway and data on these indicators will be presented in the next version of the report

In summary and generally speaking, Guernsey's relative performance on these indicators is 'good' or 'very good'.

Town Accessibility

Town remains a centre for transport connections, although there is no centralised transport hub within Town that accommodates all transport options. However there are bus services to most parts of the island from the Town Terminus, the main taxi rank is located at the Lower Pollet, and connections to other islands in the Bailiwick, as well as Jersey, France and the UK, leave from the harbour. Pedestrian and cycle infrastructure in the town is varied, but several improvement projects have either taken place within the past year or are planned.

A revised bus timetable began operation in February 2018, with 20 bus routes operating in the day and 3 night bus routes. All of these routes serve Town. The 2018 bus service

⁴ <http://www.harbours.gg/article/169493/Its-a-hat-trick-Guernsey-wins-Best-UK--British-Isles-Port-of-Call-in-Cruise-Critic-UK-Editors-Picks-Awards-for-third-time>

revisions included 2 new routes as a direct result of feedback from the travelling public⁵, and minor revisions to other services were made to improve reliability or coverage of the areas that they serve. In terms of bus use across the island, passenger journeys increased by 2.8% compared to 2017.

Cycle infrastructure was not reported in the 2017 Main Centre Survey, but [Appendix 3: Location of Cycle Stands](#) details the number and location of stands in Town and any changes will be reported in future Surveys. The cycle stands appear to be logically located and include stands at the entrance points to the Core Retail Area, for example on Church Hill, North Plantation and Ann's Place, as well as in locations close to visitor attractions (Castle Emplacement and La Vallette, for example). Additional cycle hoops were installed at Hospital Lane during 2018 and an initiative to allow cycling uphill on the footpath on Val des Terres was launched.

Currently, the Transport and Highways Service carries out surveys of the occupancy levels of the cycle stands but there is limited data at this time against which to draw conclusions regarding capacity and use of these stands.

In terms of improvements to pedestrian infrastructure, there have been several projects intended to improve accessibility and connectivity in Town. These include a new accessible crossing point which has been installed to link a new footway from the bottom of Havelet through to Les Echelons and an extension of the pavement at La Vallette. Additionally, Pier Steps were repaired and work has been carried out to restore grip to parts of St James Street. There have also been improvements at La Vrangue, including widening the road, adding two zebra crossings, installing lighting for the crossings, dropped kerbs and extending a pavement. A new footway and dropped kerbs were installed at Le Truchot, as well as new dropped kerbs and blister paving at the Ruelle Braye/Colborne Road junction. St Julian's Avenue has also been restored with tree-planting, enhancing the pedestrian environment. Other planned improvement includes the resurfacing of Market Street to improve accessibility and the public realm, due to take place in Spring 2019.

To improve safety for both pedestrians and bicyclists, a Toucan crossing has been installed at the northern end of the cycle path along the sea front which better connects Town to the north of the island, and 2018 saw proposals to extend the 25 mile per hour speed limit for 'community hub areas', to broadly cover all Local Centres and Main Centre Outer Areas. The introduction of the new speed limits commenced 7th April 2019.

Designated parking spaces for disabled people are located throughout the Main Centre, and two new accessible parking bays were installed in 2018 on the Albert Pier. Other changes to parking included the introduction of additional small car parking spaces at Havelet and Salerie car park and the introduction of dedicated electric vehicle parking spaces at North Beach car park. Car parking spaces at Hospital Lane were re-aligned to improve road safety.

As yet cycle and pedestrian routes around Town have not been mapped. Such data would provide a better overall picture of accessibility and connectivity, as well as helping to

⁵ See <https://www.gov.gg/article/163442/2018-Bus-Timetable-to-be-launched-on-5th-February-2018>

identify where improvements are needed. However it is known that there could be better use of the vennelles in Town and that cobbled areas of Town can be difficult to access for some people with mobility impairments or those using pushchairs.

The dominance of traffic along the seafront remains an issue, which divorces the harbour area from the rest of Town. According to evidence (2017 Retail Survey and 2013 Vision), improvements to the public realm would be welcomed, including an increase in pedestrianised areas, which could also act as a measure to enhance vitality and viability. These are issues being considered as part of the wider Seafront Enhancement Area which is one of the States identified priorities.

A specific initiative launched in October 2018 was the 'Accessible Town' project by the Guernsey Disability Alliance and Access for All. This included an accessible Christmas lights and shopping event, as well as an awareness raising campaign. Additionally, and related to accessibility, the St Peter Port Constables launched a Community Toilet Scheme in January 2018 to improve public toilet provision away from the harbour area.

Town Main Centre Inner and Main Centre Outer Areas

As in 2017, a desk-top survey was carried out for the Main Centre Inner and Main Centre Outer Areas to identify buildings in non-residential use and these buildings were subsequently surveyed on site to check their use and occupier. Buildings falling within the Key Industrial Areas and Key Industrial Expansion Areas were not assessed, as this will form part of a separate Employment Land Survey. **Map 4** below shows the spatial distribution of non-residential uses at ground floor within the St Peter Port Main Centre, including the Main Centre Inner Area, Main Centre Outer Area, Core Retail Area and Regeneration Areas. Please note that **Map 4** is intended to provide an overall impression of the spatial distribution of non-residential uses but more detailed maps follow later in this report.

As in 2017, the Main Centre Outer Area is predominantly residential, with clusters of non-residential uses such as industrial uses south of La Vrangue and office uses at Admiral Park in the northern part of the Main Centre Outer Area. Along the inter-harbour route there is a variety of uses, including industrial, storage and distribution; office; retail; and restaurants, cafes and pubs.

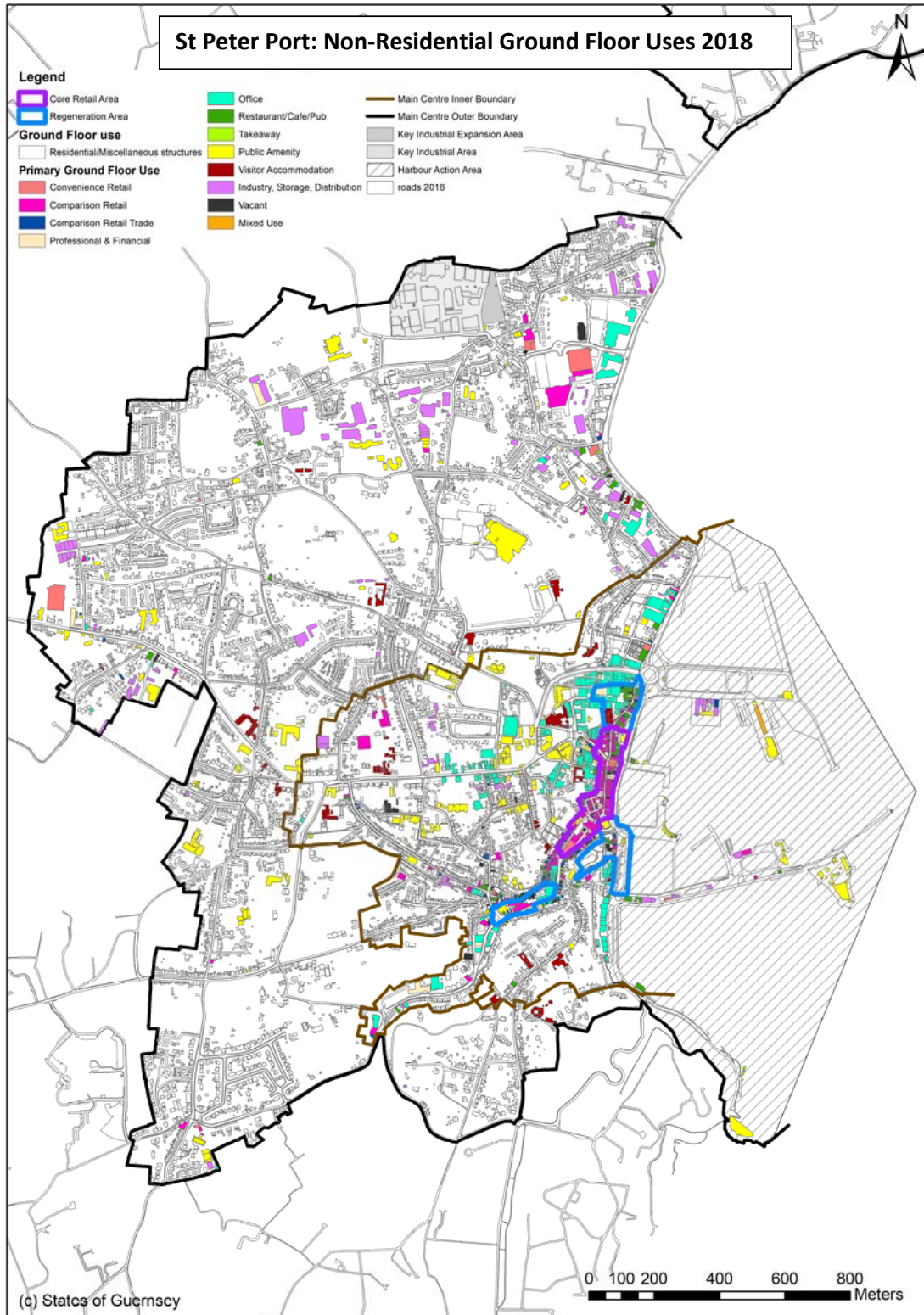
There are few retail units in the Main Centre Outer Area, although the two main supermarkets (Waitrose Admiral Park and Waitrose Rohais) are situated on the periphery of the Main Centre Outer Area. Within the Main Centre Inner Area, there are concentrations of retail use, for example around the edges of the Regeneration Areas and Core Retail Area.

Public amenity uses (shown yellow) such as schools, doctors, churches and leisure facilities are scattered throughout, with more concentrated public amenity uses within the Main Centre Inner Area, reflecting a higher density of users and the additional 'town centre' facilities such as the museum, library and courts. Facilities at La Vallette, including the bathing pools and kiosk, and Castle Cornet, provide additional public amenity uses on the periphery of Town (the bathing pools, as they are not buildings, are not indicated on the maps). Visitor accommodation is focussed in and around the Main Centre Inner Area (shown deep red).

There are few open green spaces within Town, but Candie Gardens within the Main Centre Inner Area forms a high quality public open space, complemented by the café and museum, on the periphery of Town. A smaller space closer to the Core Retail Area is St Paul's Garden on St James Street, which has recently been host to various temporary art exhibitions. In the Main Centre Outer Area, Cambridge Park, Beau Sejour and Les Cotils again offer high quality public open space, much of which falls within the Important Open Land designation which recognises the value of these areas (and others) in providing breathing space in the built environment and which are therefore protected from insensitive or inappropriate development.

As noted last year, office uses (shown in deep blue/green) line the main routes into Town towards the Core Retail Area (for example Rue de Pre, South Esplanade, The Grange and St Julian's Avenue). A variety of non-residential uses also line the piers within the Harbour Action Area (within the Main Centre Inner Area).

There do not appear to have been any significant changes to the spatial distribution of non-residential development within the Town Main Centre Outer and Main Centre Inner Area since the 2017 survey was undertaken.



Map 4: Non-residential ground floor uses in St Peter Port Main Centre 2018

St Peter Port Harbour Action Area

The St Peter Port Harbour Action Area overlaps part of the Core Retail Area, Lower Pollet Regeneration Area and South Esplanade/Mignot Plateau Regeneration Area. It extends to include the Castle Emplacement, Albert Pier, Victoria Pier, North Beach and La Salerie Car Park, as well as La Vallette and Les Echelons. The extent of the designation is shown below on [Map 5](#), along with the non-residential uses in this area recorded during the survey. The Harbour Action Area is shown with a grey diagonal line throughout the designation.

Harbour Action Areas have been identified where a co-ordinated approach to mixed use development is supported, recognising the potential opportunities for development and securing significant inward investment, as well as improvement of the appearance and accessibility of public places. With this policy basis and to progress the States priority for Seafront Enhancement, the Seafront Enhancement Area (SEA) programme has been established to explore opportunities and coordinate development of the eastern seaboard, taking into account economic, environmental and social objectives.

2018 saw the ‘See Potential’ consultation⁶, which sought views on six sites within Town where there may be opportunities to enhance the seafront as part of the SEA Programme and the Harbour Action Area Local Planning Brief. The results of this consultation have yet to be published but the indications are that there was a good level of positive engagement in the consultation by the public. Any on the ground changes resulting from the consultation will be captured in future Main Centre Surveys.

Since 2017, perhaps the most significant development within the St Peter Port Harbour Action Area is the completion of the redevelopment of Havelet Waters on its periphery. There have also been the improvements to paving as mentioned above, linking Les Echelons to Havelet and extending the pavement at La Vallette.

As in 2017, the non-residential uses within St Peter Port Harbour Action Area remain diverse, reflecting the many functions of the Town and harbour. Facing the seafront along The Quay, North Plantation and Lower Pollet are a variety of shops, cafes, restaurants and bars, with many places taking advantage of the views out across the Islands. Towards the south of the Harbour Action Area there are a range of uses including comparison and convenience retail and public amenity uses (including toilets and bus information kiosk).

There are several pubs, cafes and restaurants on South Esplanade, whilst office use dominates Les Echelons. Non-residential uses along La Vallette include Octopus restaurant, the kiosk, bathing pools, museum and aquarium.

Castle Emplacement has a variety of uses, many of which are recreation based, and also include The Slaughterhouse bar and restaurant, the model yacht pond and Castle Cornet, as well as some retail, storage (predominantly boat storage and associated paraphernalia) and places to eat and drink, including the Guernsey Yacht Club. It provides the main access for

⁶ As part of the Seafront Enhancement Area programme, six States owned sites were the subject of public consultation to identify potential opportunities to enhance the St Peter Port seafront. For further information see <https://www.gov.gg/seafront>

the Islands fishing fleet and workshops. There are often conflicts between the uses which also affects accessibility.

Cruise Liner passengers arrive at Albert Pier, and there are associated facilities located there, including the Petit Train and ticket kiosk. There is also a restaurant on Albert Pier and marina facilities for visiting boats, plus a new Marine Services Centre which opened in late 2018. In 2018, Guernsey won the 'Best of UK and British Isles Port of call' category in the prestigious Cruise Critics Editors' Picks Award 2018 for the third time, with Cruise Critic editor Adam Coulter noting improvements made to welcome visitors. The predominant use of Albert Pier, however, is for short stay parking, although it is also used for recreation and leisure based activities on holidays and special occasions. This adversely affects public realm and accessibility for pedestrians and non- car users.

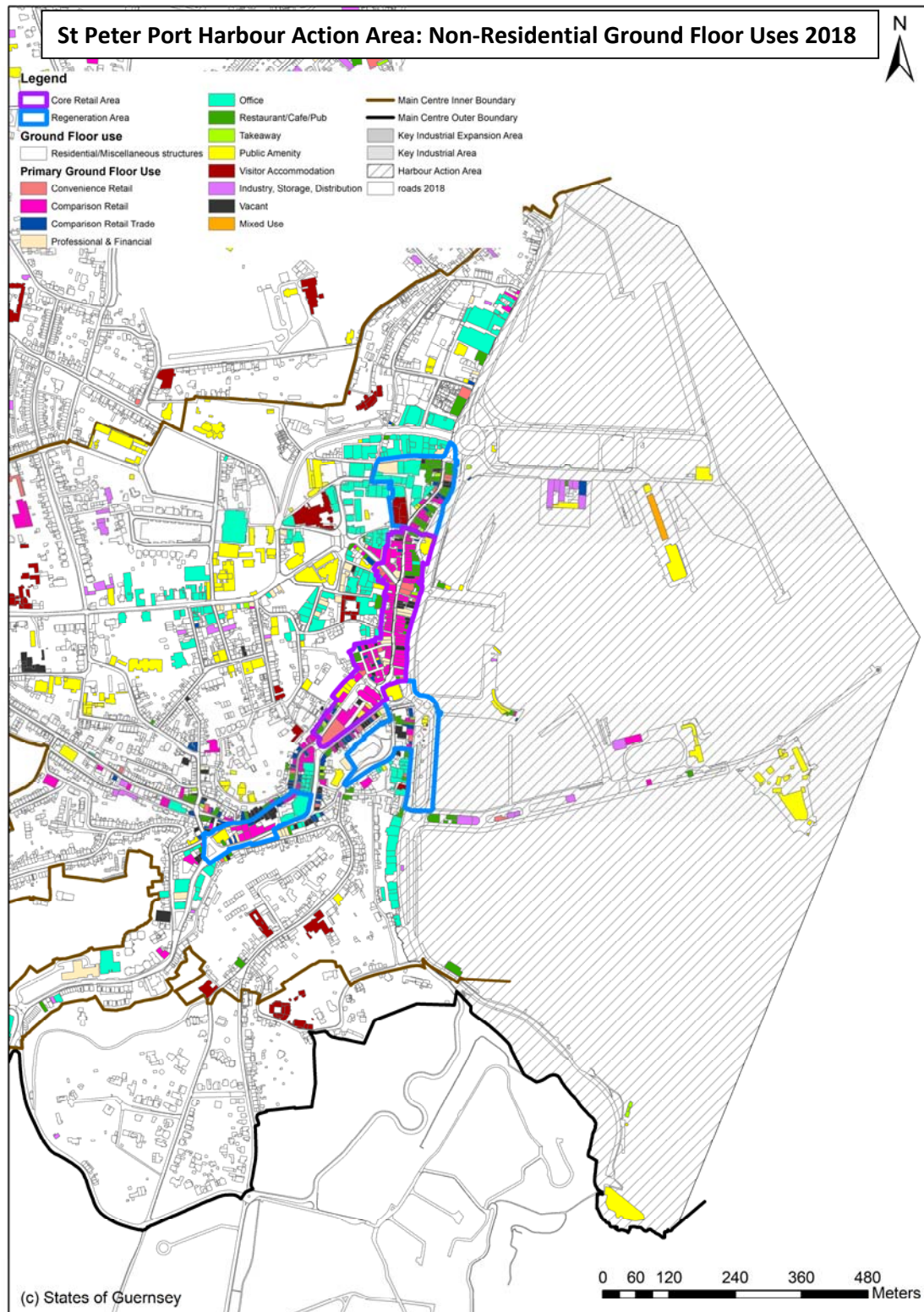
Victoria Pier is again dominated by car parking which adversely affects public realm and accessibility. This also includes a restaurant, marina facilities, public toilets, access to Marina and Swan pontoons, and is used as recreational space on holidays and special occasions and also a well-used seating area overlooking the visitors marina.

There are a variety of uses at North Beach, including car parking, ticket offices, café, ferry terminal, customs buildings, port related offices and workshops. It is an area of particular conflict between uses. It is also used for one-off leisure events.

There is no real public art or focal points within the HAA, such as attractive open spaces or places to congregate at the water side. However there are plans to resurface the access road to the west of North Plantation and make public realm improvements in that area.

This diversity of uses on the Piers is reflective of the many functions of the harbour. A challenge of the Harbour Action Area will be to provide for the operational and functional requirements of the port whilst encouraging appropriate development and inward investment, and balancing this with conserving and enhancing the harbour's historic character, whilst making the most of the harbour as an asset both to Town and island-wide.

Despite the diverse range of uses, the harbour side of the Harbour Action Area remains dominated by traffic and parking which remains a significant challenge of the St Peter Port Harbour Action Area.

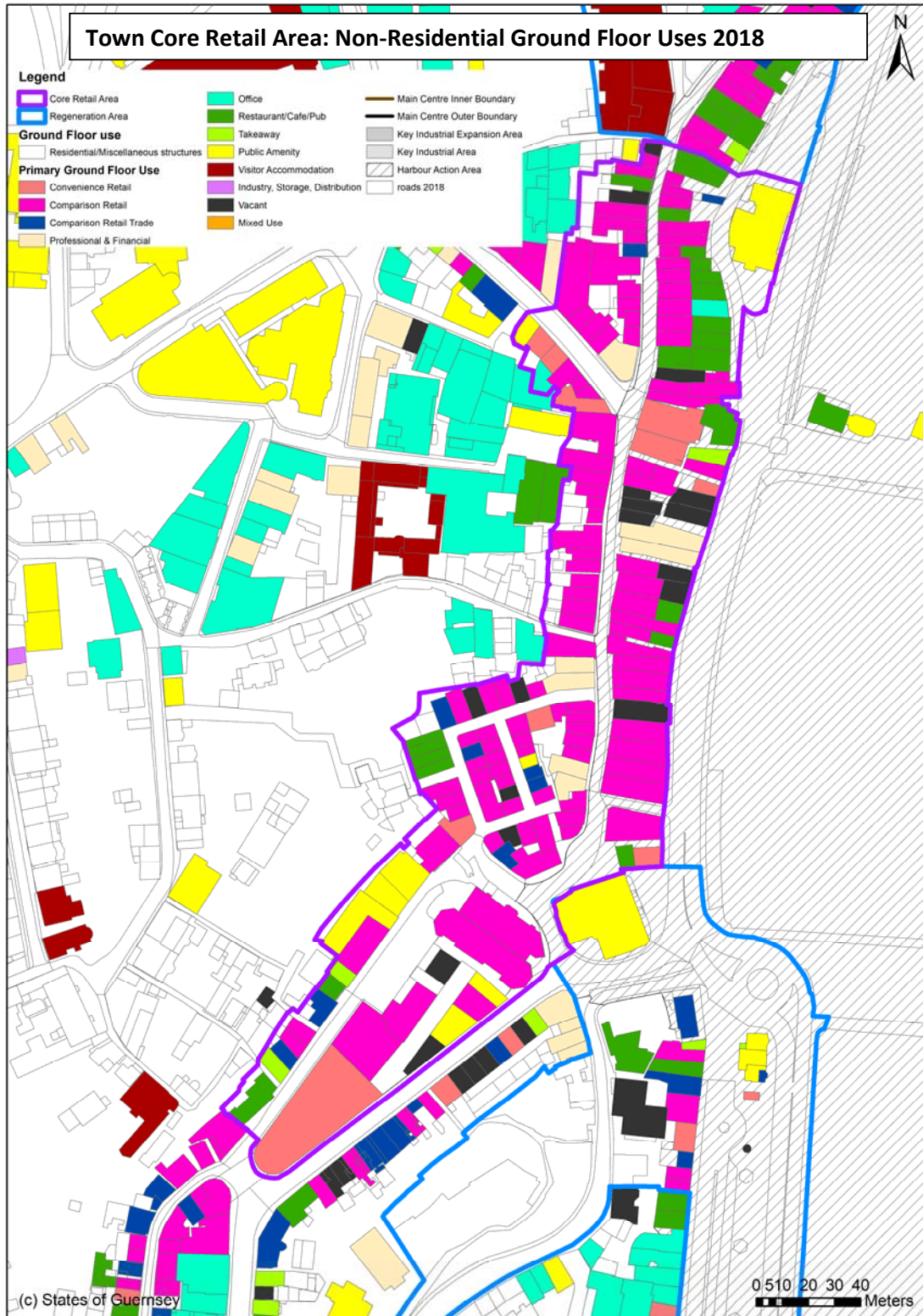


Map 5: Non-residential ground floor uses in St Peter Port Harbour Action Area 2018

Town Core Retail Area

The Town Core Retail Area represents the primary shopping area of Guernsey and the IDP policies seek to focus the area's retail function at ground floor level. The Area is largely pedestrianised which creates a pleasant and safe environment for shopping, encouraging dwell time and prioritising the shopper over the car.

Map 6 shows the extent of the Core Retail Area designation, outlined in purple, and shows the ground floor uses recorded during the 2018 survey.



Map 6: Town Core Retail Area Ground Floor Uses 2018

The Town Core Retail Area is clearly dominated by retail uses, with supporting uses such as banks and places to eat and drink. There is a particular concentration of restaurants, cafes

and pubs around North Plantation, on the periphery of the Core Retail Area. The Guille-Allez Library and the Tourist Information Centre are the two main public amenity uses within the Core Retail Area, again on the edges of the designation. Please note that the colours in the figures below do not correspond with the colours used in the maps, though the categories are consistent.

Ground Floor Uses

Figure 1 shows the breakdown of uses by unit in the Town Core Retail Area on the ground floor observed during the 2018 survey by percentage.

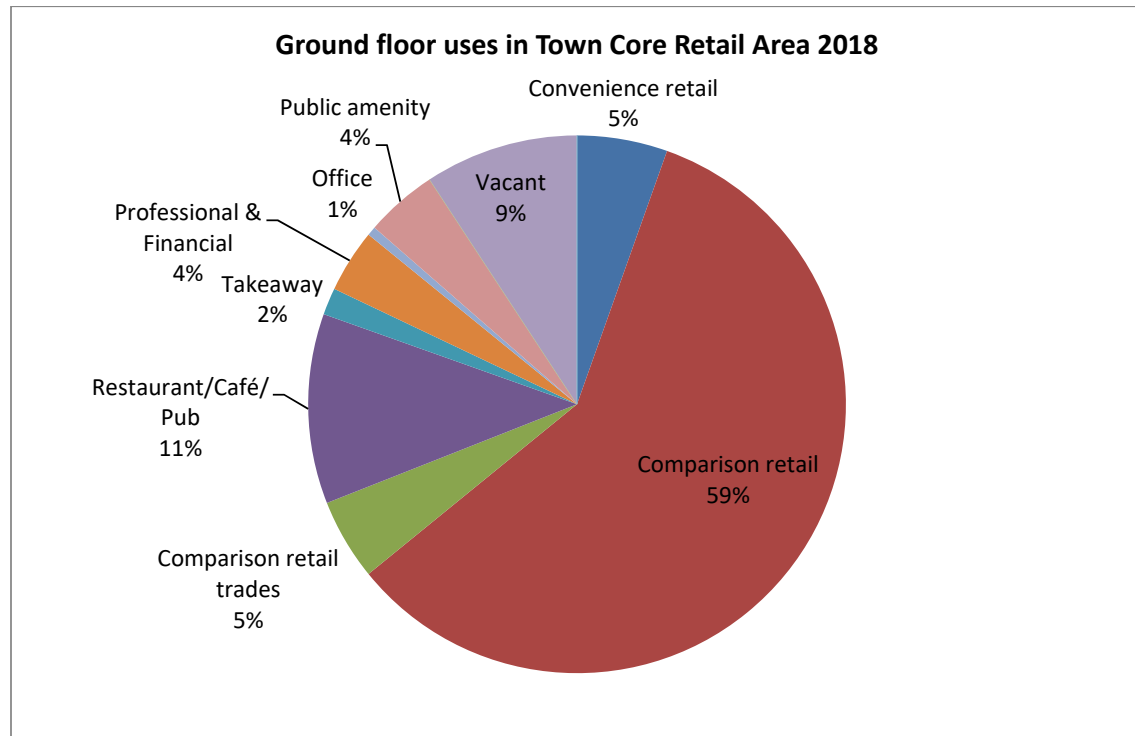


Figure 1: Percentage of ground floor units in each use within the Town Core Retail Area 2018

The retail function, including retail trades such as hairdressers and cobblers, accounts for 69% of the units in the Town Core Retail Area, which is consistent with the 2017 data (which recorded 68% retail).

The number of vacancies was, however, higher this year, with 9% in contrast to 5% last year. Of the 17 units that were recorded as vacant, the majority had been previously in comparison retail use (6 units), and 5 units have previously been in use as café, restaurant or bar. There is no particular explanation for the increase in vacancies compared to 2017, however from informal observations, many of these vacancies have been filled since the survey was carried out. For example 39-41 High Street (which was formerly the women's clothes shop East) has already reopened, the vacancy at 4 Commercial Arcade is soon to reopen as Oodles (was Tangys) and vacancies facing the Quay are opening as new restaurants, cafes and bars (e.g. Balthazar, Gusto, The Tap Room) following extensive refurbishment works (which is a possible reason for longer vacancy period). It is positive that these units

appear to have been filled quickly, but it has also been observed that several additional units have become vacant since the survey was carried out. These will continue to be monitored and reported on in future Main Centre Surveys.

The issue of vacancies aside, the results for the Core Retail Area remain generally positive with the predominant use clearly retail, supported, but not overwhelmed by, other uses complementary to that primary retail function.

Upper floor uses

The information on the uses on the upper floors of the Core Retail Area has been refined and improved since 2017 and whilst it might not represent 100% of the information, it is a more accurate picture than previously. Upper floor data is collected both through on-site survey and desk-based information collection (for example TRP records and planning application history). **Figure 2** shows the use of upper floors in the Core Retail Area by type where the use is known. As previously found, the upper floor use is often complementary to the ground floor, so for example there is a significant proportion of comparison retail on upper floors, which consists of both floor space open to customers but also floor space dedicated to ancillary storage.

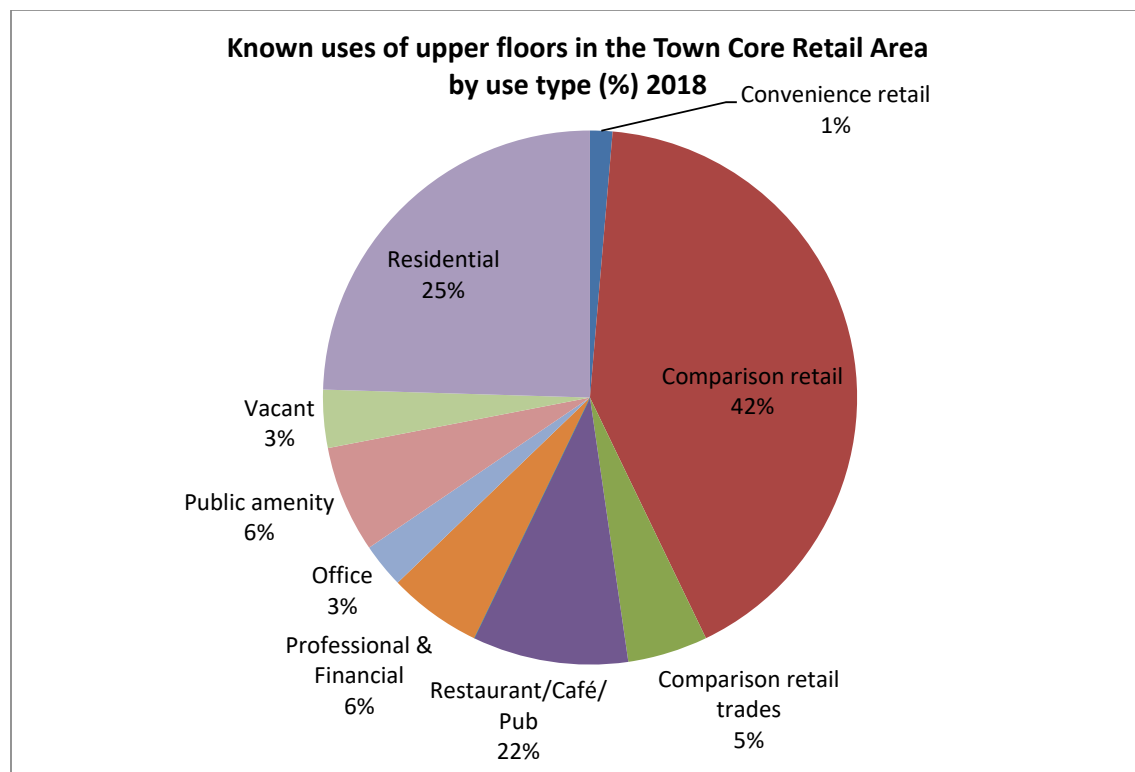


Figure 2: Percentage of upper floor units in different uses within the Town Core Retail Area, where known 2018

The proportions of upper floors in each use are broadly similar to those reported in 2017, with predominantly comparison retail use on upper floors, complementary to the ground floor use. Residential use on upper floors contributes to the vitality and viability of Town, supporting the retail and complementary functions, and is supported by IDP policies.

Footfall

In common with the footfall data from 2017, the 2018 footfall counts were higher in the Town Core Retail Area than any other areas surveyed, with the lunchtime counts being the highest and evening counts the lowest. The daytime counts were noted to include a large number of tourists from visiting cruise ships so count data is likely to vary significantly according to season. Overall there were no notable differences between the 2017 and 2018 datasets however the information available at this time is still too limited to draw statistical conclusions.

Opening Hours

Of the units in the Core Retail Area where opening hours are known, including upper floors as well as ground floors, 14.19% are open after 5pm and 11.22% are open on Sundays. This is similar to the findings in 2017. These units are predominantly restaurants, cafes, pubs and bars which are uses that traditionally support the evening economy. Few shops in the Core Retail Area appear to open on Sundays or after 5pm.

Building condition

The environmental quality of Town Core Retail Area is kept to a high standard and the figures show a slight increase in the number of units considered to be in 'good' condition compared to 2017 (82.5% compared to 80%). One vacant unit however was assessed as 'poor', equating to approximately 0.5% of the total number of units (see [Figure 3](#) below).

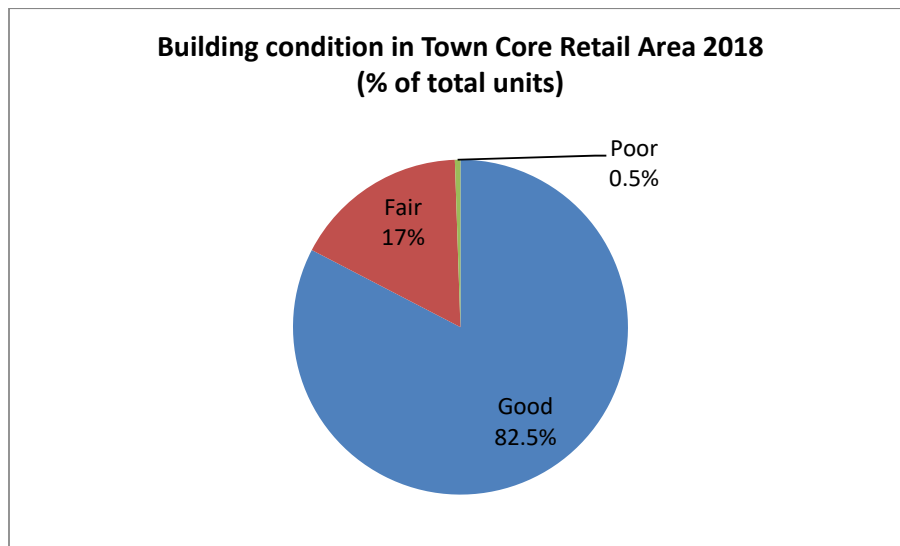


Figure 3: Building condition in Town Core Retail Area

The building condition survey results are, as last year, very positive indicating continued investment in the area. It is also interesting that despite an increased level of vacancies when the survey was undertaken, this did not equate to units in a poor state of repair and in fact several of these were still rated as good as renovation had either taken place or was underway at the time of survey. However the one unit rated as poor was a vacant unit.

Looking at the condition of vacant units in more detail, 8 of those 17 vacant units were rated as being in good condition, 8 in fair condition and 1 in poor condition. 8 units out of the total 17 were either undergoing renovation or refurbishment or had been renovated or

refurbished. Refurbishment and renovation are signs of investment so it is important to interpret the increase in vacancy level with caution.

Façade Activation

Following last year's trial of the Façade Activation study on a section of the High Street, for 2018 the whole Core Retail Area was assessed during the survey. Buildings are given a façade activation rating as described in the Methodology section and [Appendix 2](#) of this report. In the context of vacancies, whilst the building condition of vacant buildings was not necessarily a problem in the Core Retail Area, the façade activation ratings were low on the units because there was little interest and passers-by would not be encouraged to linger – with a potential adverse effect on dwell time of shoppers.

Overall, the façade activation results are shown in [Figure 4](#).

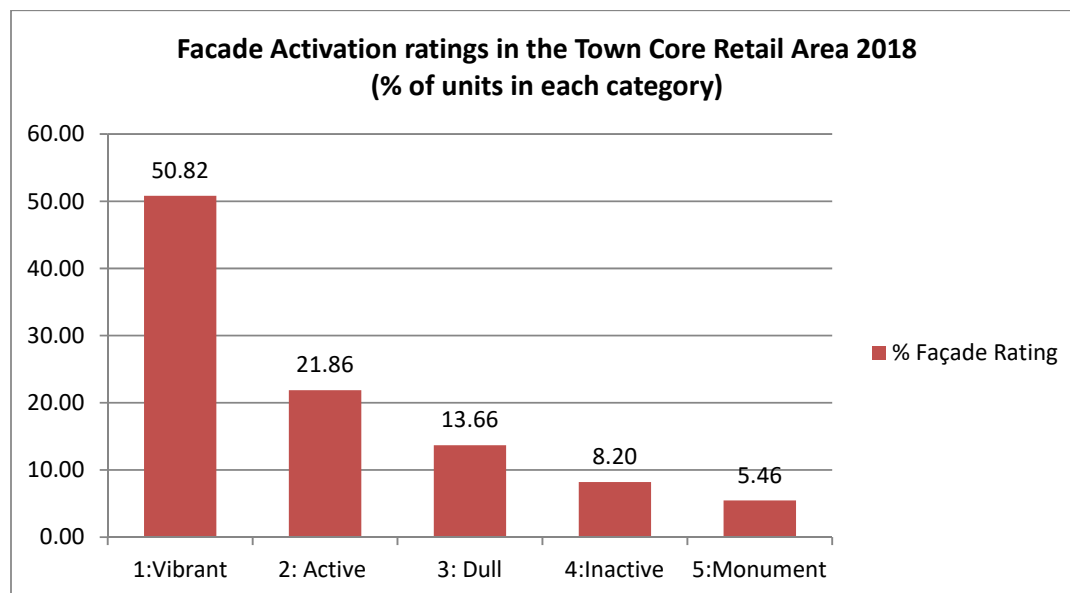


Figure 4: Façade Activation ratings within the Core Retail Area 2018

Whilst surveying the Town Core Retail Area, it was apparent that the Guernsey high street has retained a high level of historic detailing and interest in the retail units which has led to over 50% of units being given a rating of 1: Vibrant. Vibrant units are characterised by small units with many doors, high transparency with lots of character with good materials and details. Those rated as 4: Inactive (8.2%) were vacancies. The category 5: Monument refers to units that are historic or artistic, that are visually remarkable but not very active or transparent. The Market Building (Co-Op), Tourist Information and two pubs were included in this category.

There is no comparable data set for other town centre locations at this time, but it would be interesting to see how Guernsey's Main Centres compare with UK town centres in this regard in the future so we will continue to review the information available from other jurisdictions. If comparable data becomes available in the future then any findings of interest will be reported in future Main Centre Surveys.

Public Realm

In 2017, A 'Place Inventory' was carried out, focusing on Market Square in the Town Core Retail Area. This gave an assessment of the physical public realm as well as an assessment of the experience of using the space. As a lack of 'places to hang out' was highlighted as an issue for Town, a more comprehensive assessment of the public realm has been included this year, with several simple tools trialled to evaluate who is using public spaces, how and when.

Within the Town Core Retail Area, these assessments were carried out in Church Square and Market Square with the main findings reported here. This information is useful both for assessing vitality and viability of different areas of Town, but also in informing change.

Church Square

Town Church Square has high volumes of pedestrians passing through as it marks a principle entry point to the main shopping area and is where several crossing points converge on the eastern side. As such it is used by a diverse range of people of all ages and backgrounds.

On the harbourside, traffic detracts from an otherwise attractive space, and on the High Street side traffic restricts the use of the square to the small area directly adjacent to Town Church. That said, positive features include seating, planting and the historic background of the Town Church which gives a distinctive sense of place. There are attractive views of the harbour and high street, attracting people and affecting movement through the space. When in full sun, the benches are well used by people chatting, reading and eating.

Market Square

Market Square is the main area of pedestrianised public realm in Town. It is an attractive space, segregated from traffic which makes it a safe and pleasant place to spend time in. The space is large enough to allow for markets and events and forms a focal point during various festivals, for example the Literary Festival, Town Carnival etc.

There are attractive buildings and a high level of vegetation which gives an overall highly positive impression of the space, complemented by the presence of public art (the donkey statues as well as the occasional temporary installation). There are several benches in the Square though as these are well used there perhaps could be more. The steps on the north east of the Square allow for additional informal sitting although these are on the periphery of the main square. There are active uses around the square, so even on cold wet days when people are not spending time in the Square, the area can still be busy with shoppers and office workers. The library is a particular attraction of the area.

To the south of Market Square there are plans to resurface Market Street to enhance the environment and link Market Square to Mill Street and the Old Quarter in order to attract pedestrians through the area.

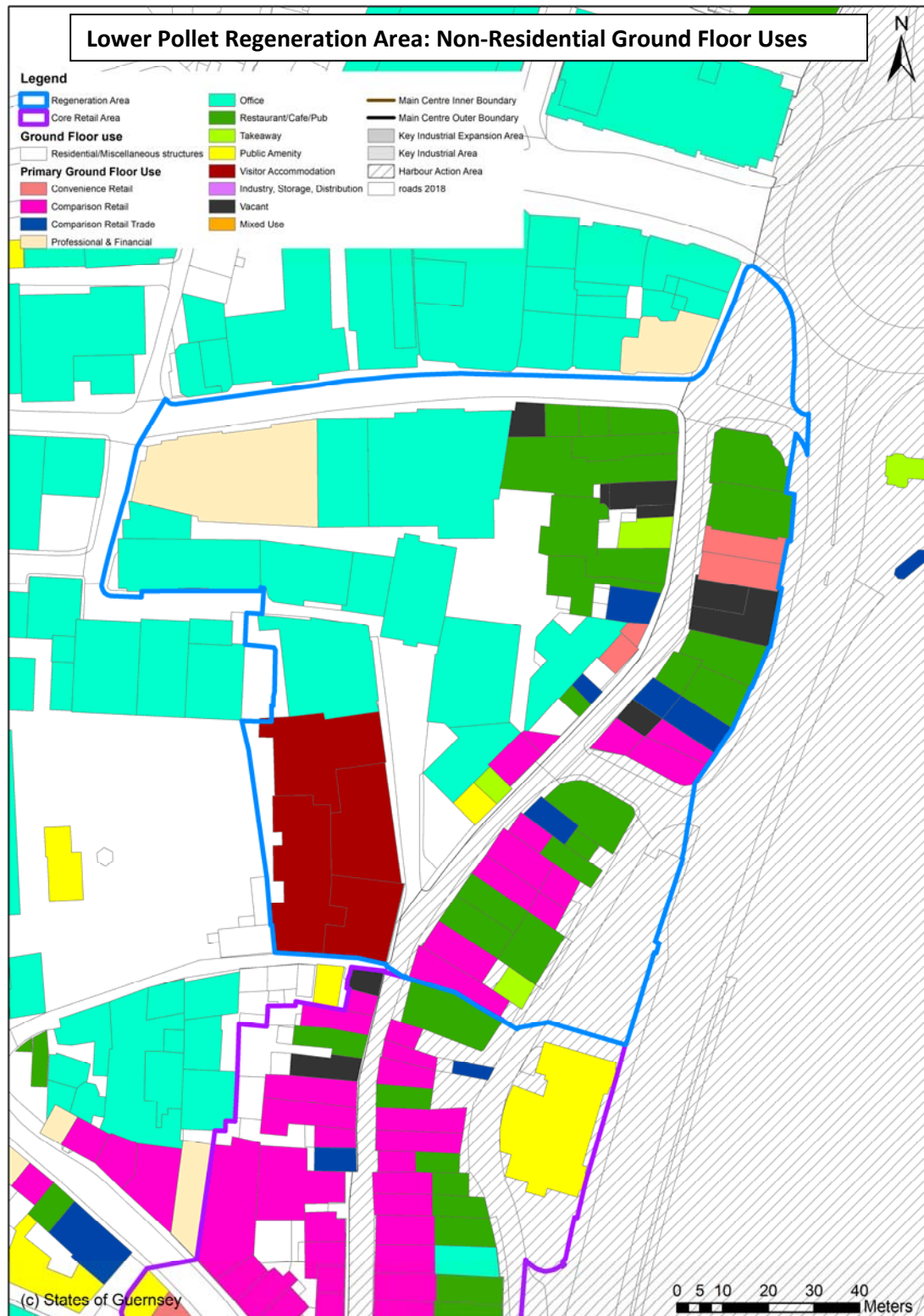
Overall the Square is a high quality part of the public realm in Town, though it could link better to the Old Quarter of Town and into the Inner Street of the Market Buildings.

Summary

Overall the evidence collected for the Core Retail Area creates a picture of a high quality, attractive environment with an appropriate range of uses, although vacancies have risen since 2017. Traffic dominance along the harbour remains an issue in Town. There are many positive attributes of Church Square and Market Square which are both well used. There could be opportunities to enhance the use of Church Square through pedestrianisation or restriction of traffic movements.

Lower Pollet Regeneration Area

The Lower Pollet Regeneration Area lies to the immediate north of the Town Core Retail Area. It covers the Lower Pollet, North Plantation, Le Truchot and La Plaiderie and includes the main taxi rank in Town. [Map 7](#) shows the extent of the Lower Pollet Regeneration Area outlined in blue.



Map 7: Lower Pollet Regeneration Area Ground Floor Uses 2018

Map 7 shows the spatial distribution of uses within the Lower Pollet Regeneration Area, with a variety of retail and restaurants, cafes and pubs on the Lower Pollet, reflecting the

transition away from the Core Retail Area. There is a high proportion of offices in Le Truchot and La Plaiderie and Moores Hotel also has a prominent position within the Regeneration Area.

Ground floor uses

Figure 5 shows the breakdown of ground floor uses in the Lower Pollet Regeneration Area.

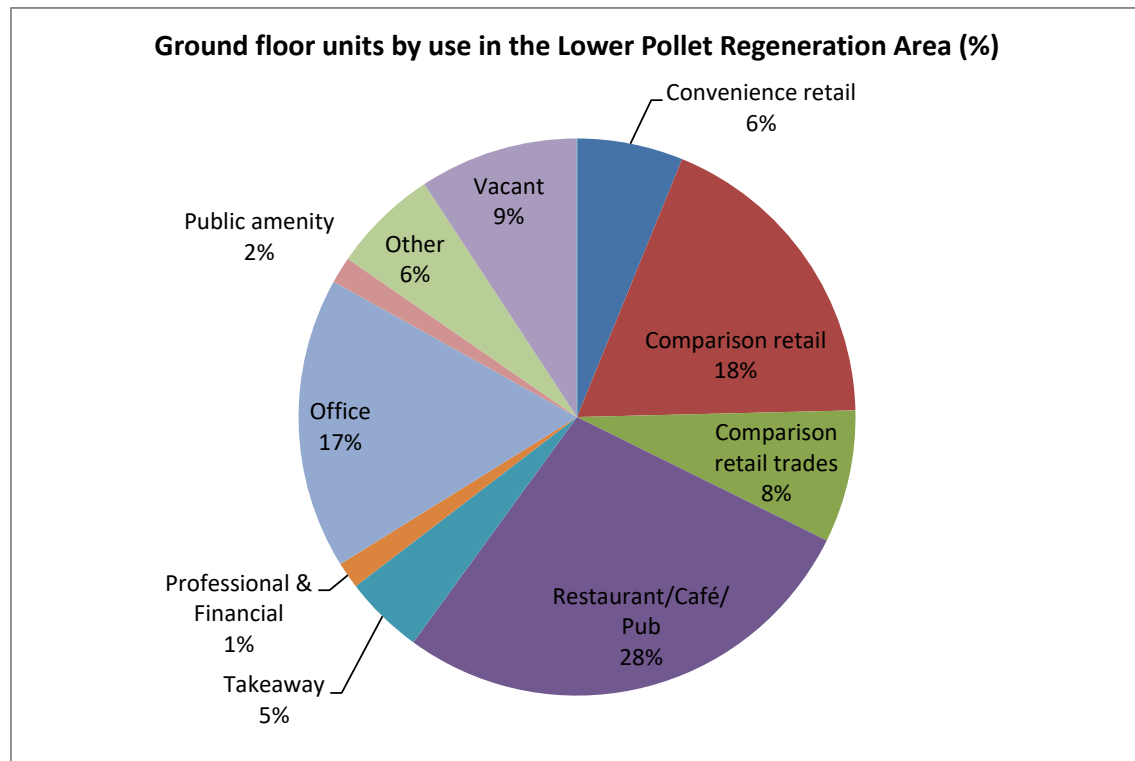


Figure 5: Ground floor units by use in the Lower Pollet Regeneration Area 2018

As in 2017, there are higher percentages of units in Restaurant/Café/Pub use or Office use compared to the Core Retail Area. The main change in the area since 2017 is the increase in the number of vacant units, which has risen from 3% to 9%. There are a total of 6 vacant units in the Lower Pollet Regeneration Area (two units within the same building – formerly Miss Nobb and Urban G) and unlike within the Core Retail Area, these units do not appear to be quickly re-let, with only one being rated as in good condition, the rest being fair or poor. This contributes to the area having a more run down appearance than the Core Retail Area, with environmental quality further impaired by the dominance of vehicles on Lower Pollet. This conflict between vehicles and pedestrians was noted in the 2017 report and since then there have been no changes to the pedestrian infrastructure.

Upper floor uses

Figure 6 shows the proportion of different uses on the upper floors within the Lower Pollet Regeneration Area.

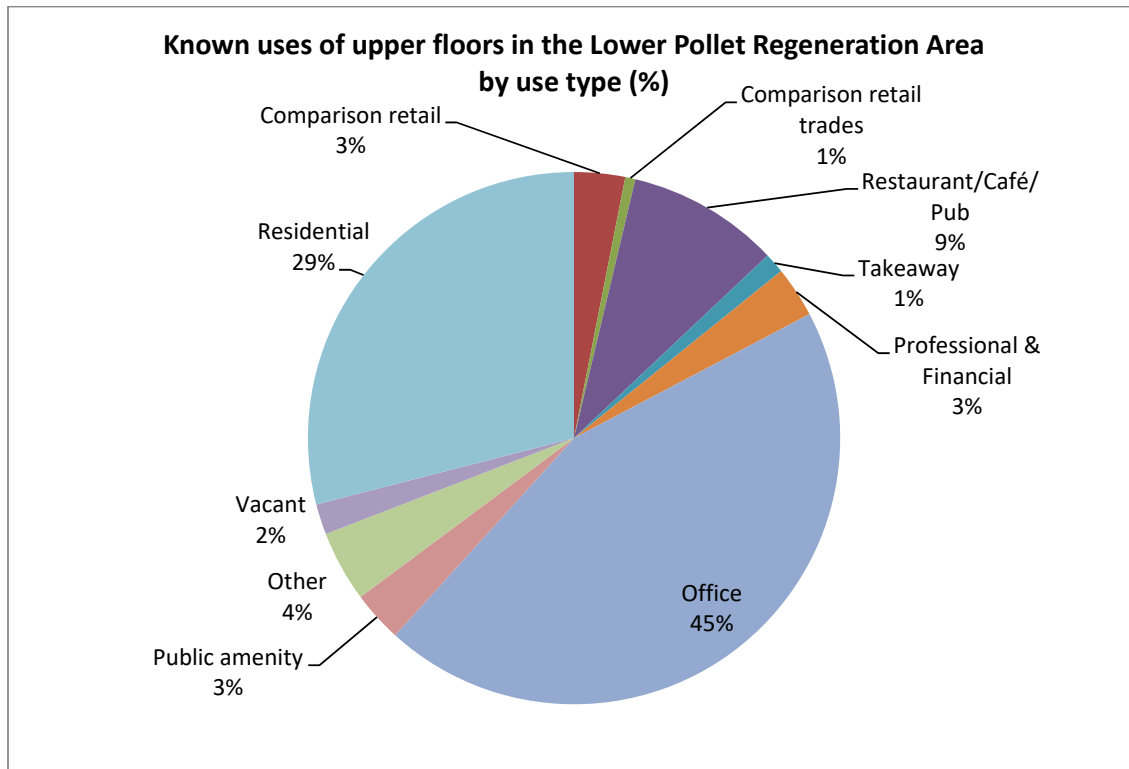


Figure 6: Percentage of upper floor units in different uses within the Lower Pollet Regeneration Area, where known, 2018

As in 2017, office use dominates the upper floors of the Lower Pollet Regeneration Area, although the refined findings of the 2018 data also show more residential use on the upper floors than previously reported. Broadly, the balance of uses remains consistent with that shown in 2017.

Footfall Counts and Opening Hours

As in 2017, the weekday lunchtime footfall counts were the highest, with noticeably lower lunchtime counts on a Saturday. The evening count on Friday was also quite low (undertaken between 18:00 and 19:00), however if this was carried out later in the evening it could be significantly higher, as it was found that there were many units with extended opening hours in the Lower Pollet Regeneration Area, reflecting the higher percentage of Restaurants/Cafes/Pubs/Bars than other areas of Town. For example, approximately 45% of ground floor units where the opening hours are known are open after 5pm.

Building Condition

Building conditions were similar to those found in 2017, although there has been an increase from 3% to 6% of buildings considered to be in poor condition. Two of these four units were vacant and the majority of units were still rated as good (66%). Figure 7 shows the relevant percentages.

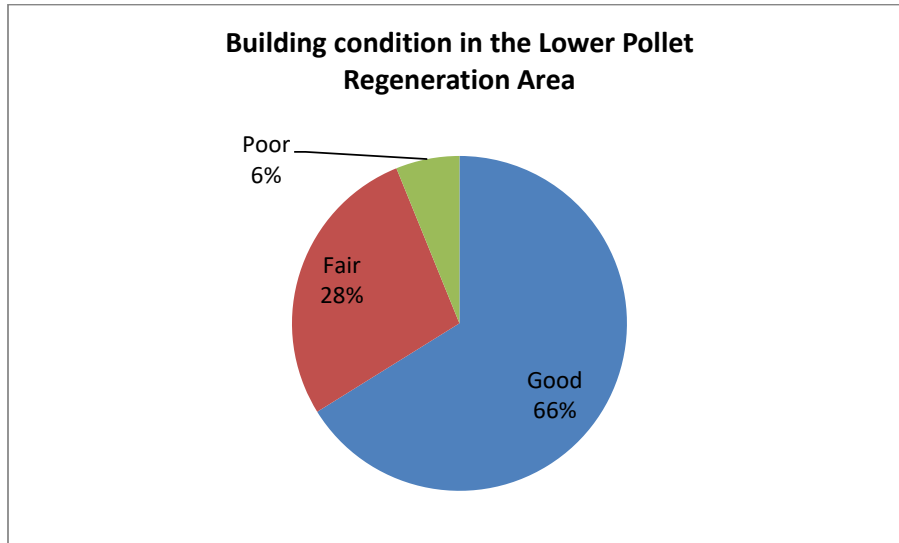


Figure 7: Building condition in Lower Pollet Regeneration Area 2018

There were less signs of investment (for example refurbishment or renovation) in the Lower Pollet Regeneration Area than in the Core Retail Area.

Façade Activation

The façade activation study was carried out on the Pollet, Lower Pollet, North Esplanade and North Plantation, but excluded the office areas as the technique is primarily intended for use in retail areas.

The façade activation ratings were not as high as within the Core Retail Area, and included a significant proportion of 'inactive' buildings – these were mainly vacancies but also included nightclubs and other units which lacked any transparency. However, overall the units rated highly as many are small, transparent and have interesting detail. Figure 8 shows the results of the survey.

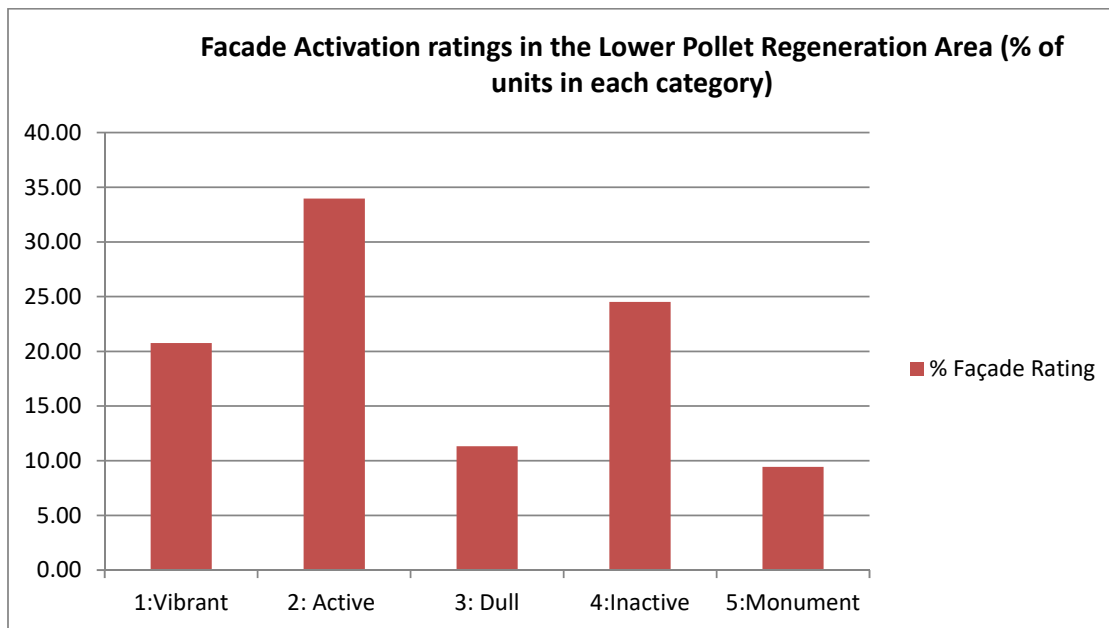


Figure 8: Façade activation ratings in the Lower Pollet Regeneration Area 2018.

Public Realm

Public realm surveys were carried out at La Plaiderie, North Plantation and at the Lower Pollet Taxi Rank. A summary of findings is set out below.

La Plaiderie

La Plaiderie area is an attractive space in a predominantly office area. There is a bench in the space which has a view of the High Street, though a bin slightly obscures this. The historic building facades and mural overlooking the Moores Hotel terrace provide interest to the space, and some tour guides pause by the benches to view the mural. Beyond the public bench, the space does not intend to invite people in to dwell, but nevertheless the scale and details of the space, despite the cars, provide an attractive area that has the potential to become a more valued public space if vehicles were removed and there were additional seating/staying options.

North Plantation

The public space at North Plantation consists primarily of a formal planted area and bus stop with cycle stands, telephone boxes and litter bins. There are often people standing waiting for buses and at the time of observation, there were also people using the benches in the planted area and a small group of people sitting and chatting on the step and low wall by the cycle stands. As part of the SEA programme, the Community Panel noted that the use of the space is negatively affected by the effects of traffic through noise, fumes and blocking of the view (in the case of larger vehicles such as buses). The space is very well used during Town events such as Seafront Sunday when the Town Quay is closed – people sit on the grass slopes and take advantage of the raised height to view the harbour. The low wall around the area provides an informal opportunity for sitting and the mature planting of the space provides shade. However the central planted area generally offers low grade planting in terms of supporting biodiversity and is also isolated by roads all around and there may be opportunities to improve both the relationship with the bars on North Plantation and with

the harbour side, recognising the positive attributes the area already has. There are already plans in place to resurface the access road to the west of North Plantation and make improvements to the public realm.

Lower Pollet Taxi Rank

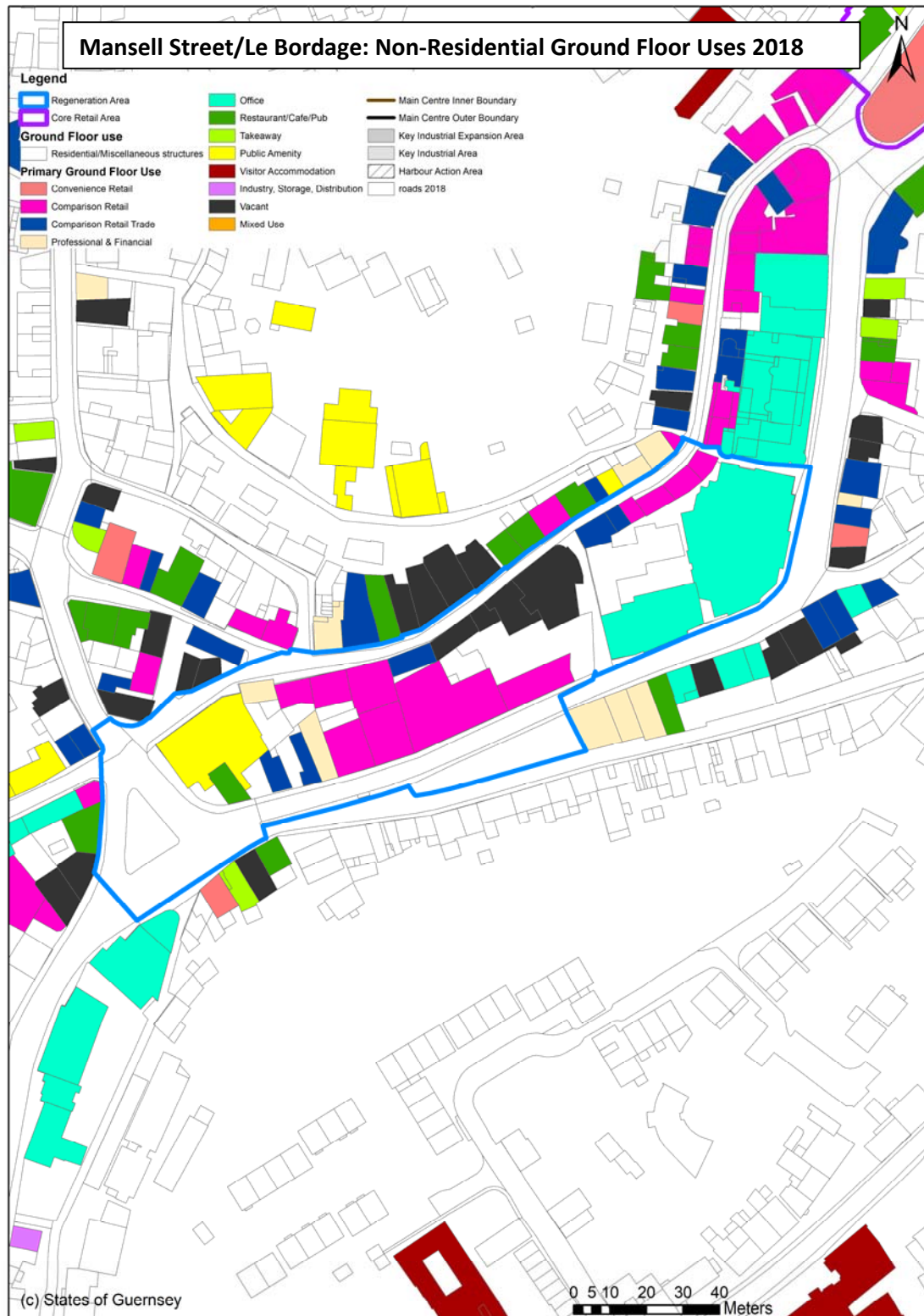
If the space were no longer to be used as a taxi rank, this area has a lot of potential to provide improved public realm, however it is next to a busy junction and the relationship between the space and the traffic would need to be managed to limit the impact of traffic noise and exhaust fumes on users of the space. However the space offers interesting things to look at including buildings such as Petit Bistro, the Weighbridge and the mast on the roundabout, as well as some views over the harbour. There are also places to buy food nearby, including the Co-Op Food Hall, White Hart public house and Hansen's sandwich shop and if managed differently there could be potential for outdoor seating and eating in the area. Currently the space is dominated by traffic and does not feel particularly clean because of exhaust fumes, noise, and sometimes cigarette smoke.

Summary

There are slight indications of decline in the Lower Pollet Regeneration Area compared to the 2017 data, but two years of data is insufficient to draw reliable comparisons against. This justifies the designation as a Regeneration Area the aims of which is to focus investment to make improvements. Vacancies will continue to be monitored to ascertain if they are long or short term and the impact of that on building condition and façade activation ratings. The public realm survey shows that there are significant opportunities to improve the environment and potentially create areas for people to enjoy an improved public realm, which can be a successful catalyst for economic investment in itself. The prevalence of offices also adds to the lunchtime vitality and viability of both the Regeneration Area and the Core Retail Area.

Mansell Street/Le Bordage Regeneration Area

The Mansell Street/Le Bordage area lies to the south west of the Town Core Retail Area and extends as far as, and includes, Trinity Square. **Map 8** shows the extent of the designation outlined in blue and the non-residential uses recorded at ground floor during the survey.



Map 8: Mansell Street/Le Bordage Regeneration Area 2018

As shown, there is a cluster of offices at ground floor level at the eastern end of the Regeneration Area fronting Le Bordage, and a group of comparison retail units in the centre

of the Regeneration Area with frontages on Mansell Street and on Le Bordage. Trinity Church forms a focal point at the top of Mansell Street.

Ground floor uses

Figure 9 shows the breakdown of ground floor uses in the Mansell Street/Le Bordage Regeneration Area by percentage.

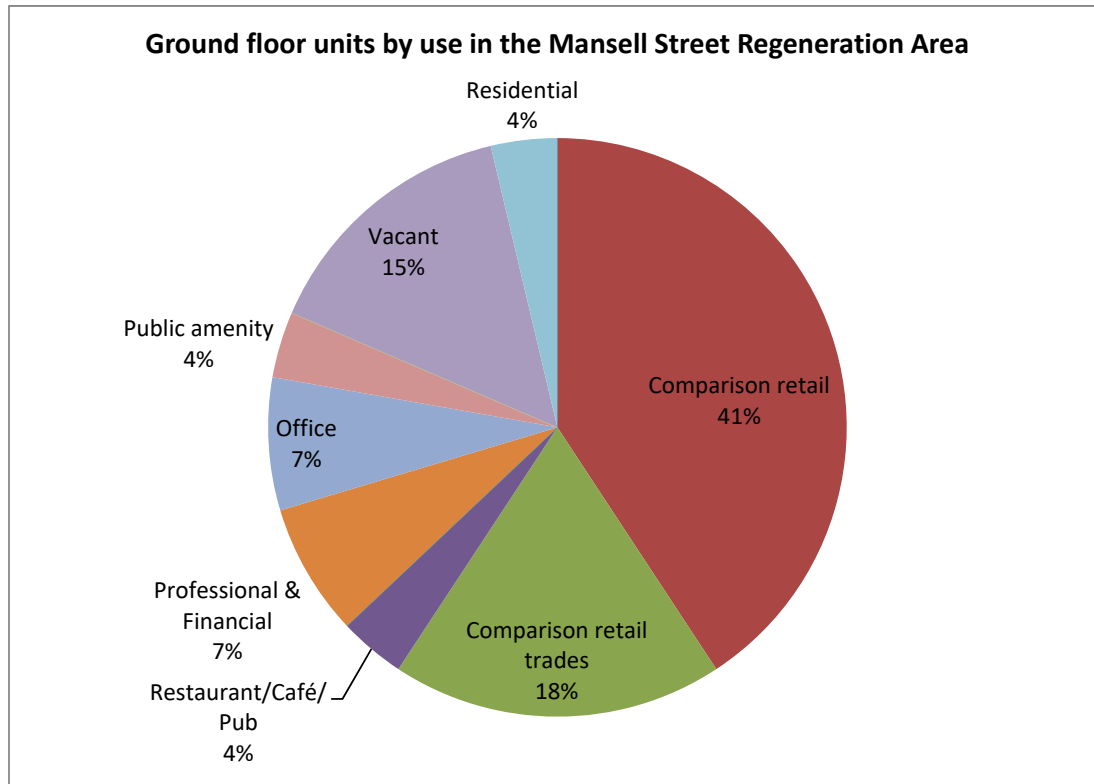


Figure 9: Ground floor units by use in the Mansell Street/Le Bordage Regeneration Area 2018

The balance of uses remains broadly similar to when surveyed in 2017, the main change being that previously there were no Professional & Financial uses recorded. However this was a result of an inputting error, as in 2017 two units were recorded as being in Office use rather than Professional and Financial, hence the reduction in the percentage of Offices units in the Regeneration Area.

The number of vacancies has reduced as the unit that was previously part of Ideal Furnishings but which has since been demolished is no longer included in the figures. This leaves a total of 4 vacant units (two of which have been knocked through into one large unit). It was noticed during survey that there were several tenanted ground floor retail units available either 'for sale' or 'to let', so whilst these units were not vacant this year, any changes to occupiers or vacancies will be recorded at the next survey.

Upper floor uses

Figure 10 shows the known uses of upper floors in the Mansell Street/Le Bordage Regeneration Area by percentage.

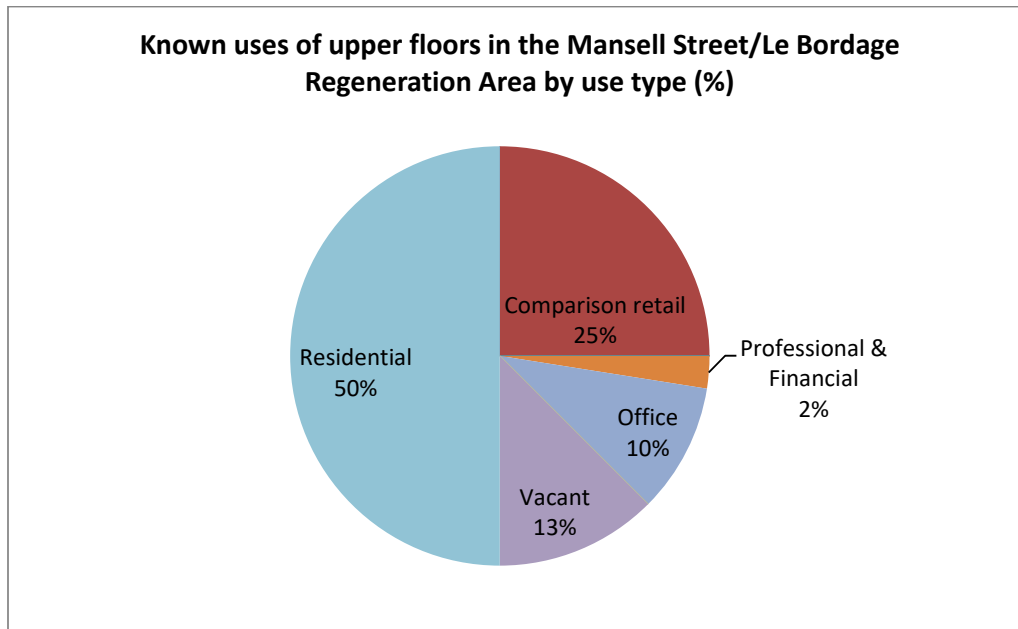


Figure 10: Percentage of upper floor units in different uses within the Mansell Street/Le Bordage Regeneration Area, where known, 2018

As with the other areas surveyed, the upper floor data has improved in accuracy since 2017 and as such the changes shown are not necessarily a result of changes on the ground, but as a result of the improved accuracy of the data collected. However residential use remains the primary use on the upper floors, with a significant proportion being used for comparison retail (principally ancillary storage to ground floor retail use).

Footfall counts and Opening Hours

Footfall was consistently higher at lunchtimes than in the morning and afternoons, possibly relating to workers walking to and from Town during this period. However whilst it was found in 2017 that the Saturday counts were lower, the Saturday lunchtime count in 2018 was the highest of all of the counts in this location, suggesting again that the results are interpreted with caution given the small data set. Of the units where opening hours are known, there were no units within the Regeneration Area with extended opening hours.

Building condition

Although building condition within the Regeneration Area was generally good, there was a higher percentage of buildings that were rated as poor (26%) and fair (11%) as shown in Figure 11, indicating that the area would benefit from inward investment and supporting designation as a Regeneration Area. The proportion of buildings rated as being in poor condition has increased from 18% in 2017 to 27% in 2018. These include vacant units and several units occupied by one business. This equates to an additional 4 units being rated as poor in 2018 compared to 2017, the units having previously been rated as fair.

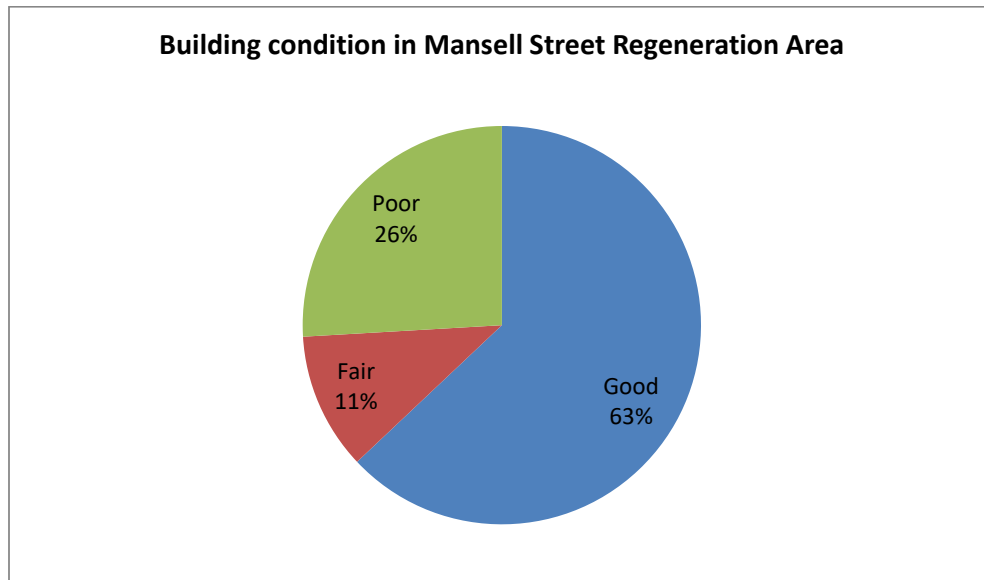


Figure 11: Building condition in Mansell Street/Le Bordage Regeneration Area

Façade Activation

Figure 12 shows the façade activation ratings for the Regeneration Area.

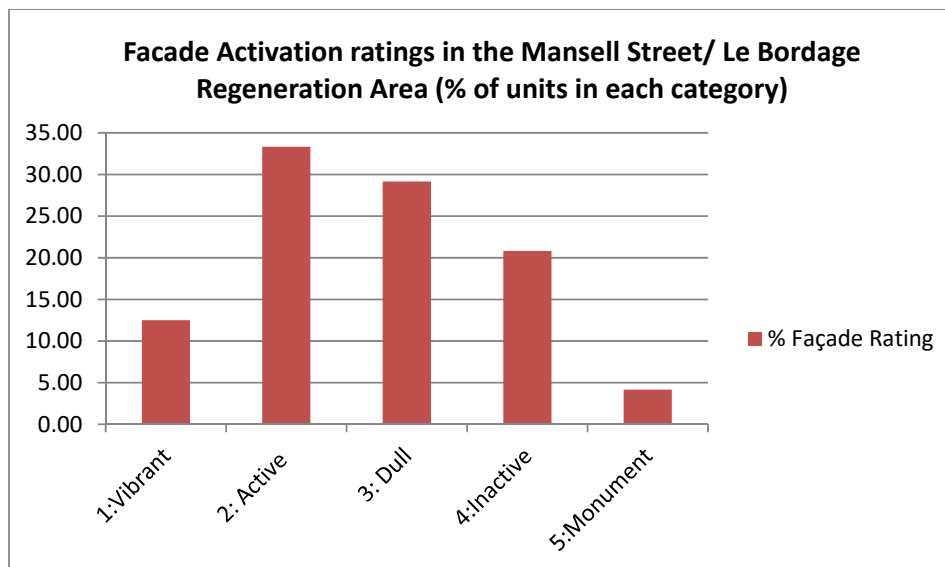


Figure 12: Façade Activation ratings within the Mansell Street/Le Bordage Regeneration Area 2018

The building facades were rated reasonably highly on Mansell Street, with small units, high transparency and a high level of detail. However on Le Bordage the units were not rated as highly for their interest which can reduce dwell time, where people walk quickly by rather than stopping to 'window shop'. The Monument category included Trinity Church.

Public Realm

A public realm survey was carried out in Trinity Square. As in previous observations, Trinity Square has the potential to offer a valuable public space but at present largely functions as a

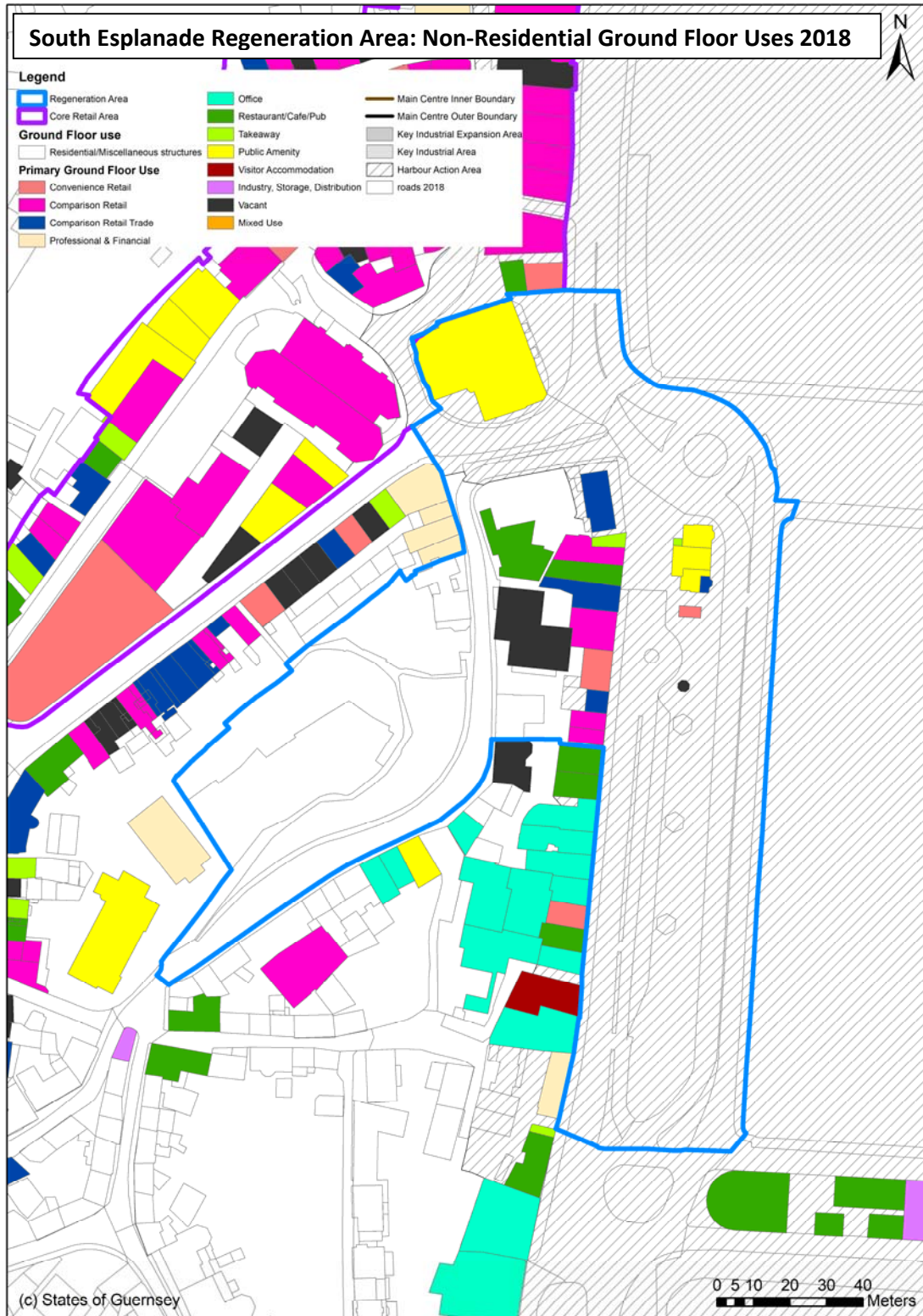
traffic island which is difficult for pedestrians to access. The noise and fumes of traffic around the square is oppressive and users of the square can feel vulnerable because of this. However the planting is pretty and there are historic features which give the square a sense of place. The mature trees offer shelter and shade and the benches are arranged so that people could have a conversation, if it were not for the high traffic flow adjacent. Informal observations suggest that the space is only rarely used.

Summary

Overall, as an area the Mansell Street/Le Bordage Regeneration Area is varied, with a pleasant, historic pedestrianised core contrasted with a traffic dominated route into the centre of Town, giving a mixed impression. The area would benefit from investment. Although there are no significant signs of decline since 2017, it was noted that several units were for sale or to let, although currently tenanted. Trinity Church acts as a focal point on Trinity Square, and there are opportunities to improve the public realm in the vicinity of the Church and Square to create an enhanced and valued public space, in contrast to the present situation where traffic dominates the area.

South Esplanade & Mignot Plateau Regeneration Area

The South Esplanade and Mignot Plateau Regeneration Area lies to the immediate south of the Core Retail Area of Town. It incorporates Town Church at the north, parking at Mignot Plateau to the south west, the bus terminus on the South Esplanade and the road and pavement fronting the Albert Pier. [Map 9](#) shows the extent of the Regeneration Area outlined in blue, with the Core Retail Area to the north.



Map 9: South Esplanade/Mignot Plateau Regeneration Area Non-Residential Ground Floor Uses 2018

Map 9 shows the uses within the South Esplanade/Mignot Plateau Regeneration Area are diverse but are likely to complement the retail offer of the Town Core Retail Area.

Ground floor uses

Figure 13 shows the ground floor uses of the units within the area by percentage.

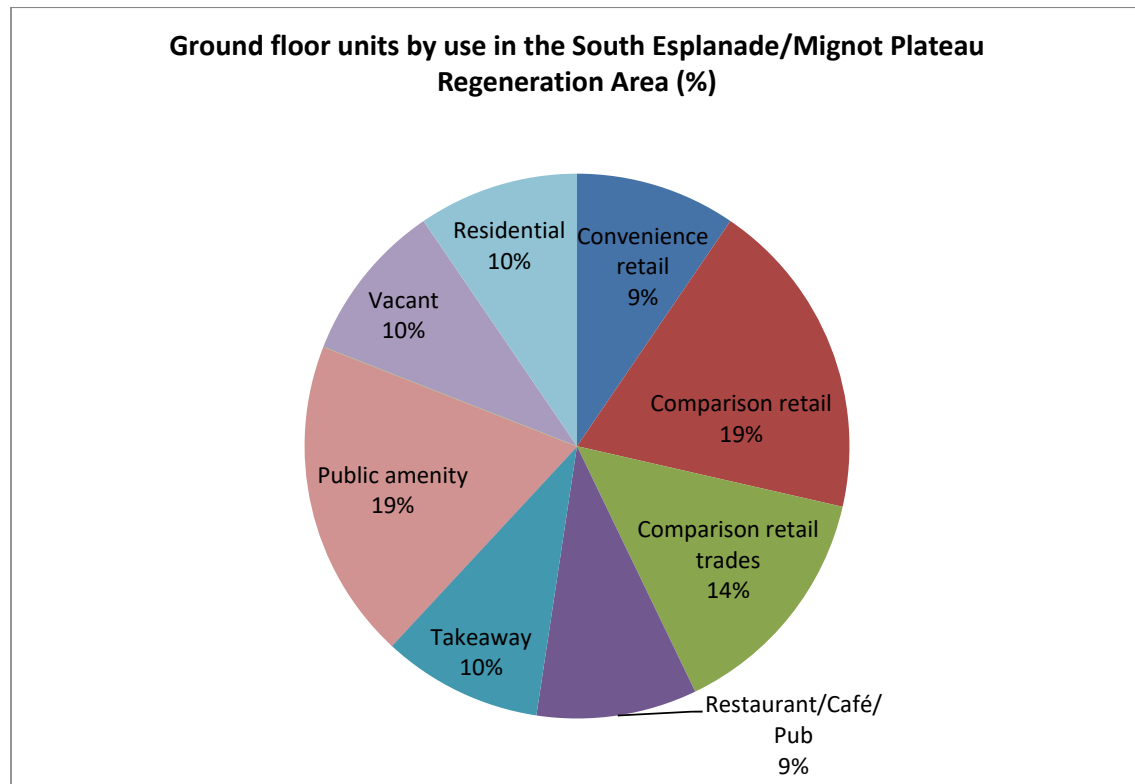


Figure 13: Ground floor units by use in the South Esplanade/Mignot Plateau Regeneration Area 2018

Since the 2017 survey, the Income Tax buildings have been vacated, as has the bus information kiosk (although this has been occupied following the survey and is used as an outreach base to provide support to children and young people) and there have been several changes to occupancy in the Albany building. There has been an increase in the percentage of comparison retail units in the Regeneration Area as a result. Public Amenity uses continue to form a significant proportion, comprising Town Church and the public toilets.

It is interesting that whilst there are a significant proportion of office units south of the Regeneration Area, there were no ground floor office units within the Regeneration Area itself, emphasising the transitional role of the Regeneration Area.

Upper floor uses

In terms of the known uses of upper floors, these are shown in Figure 14.

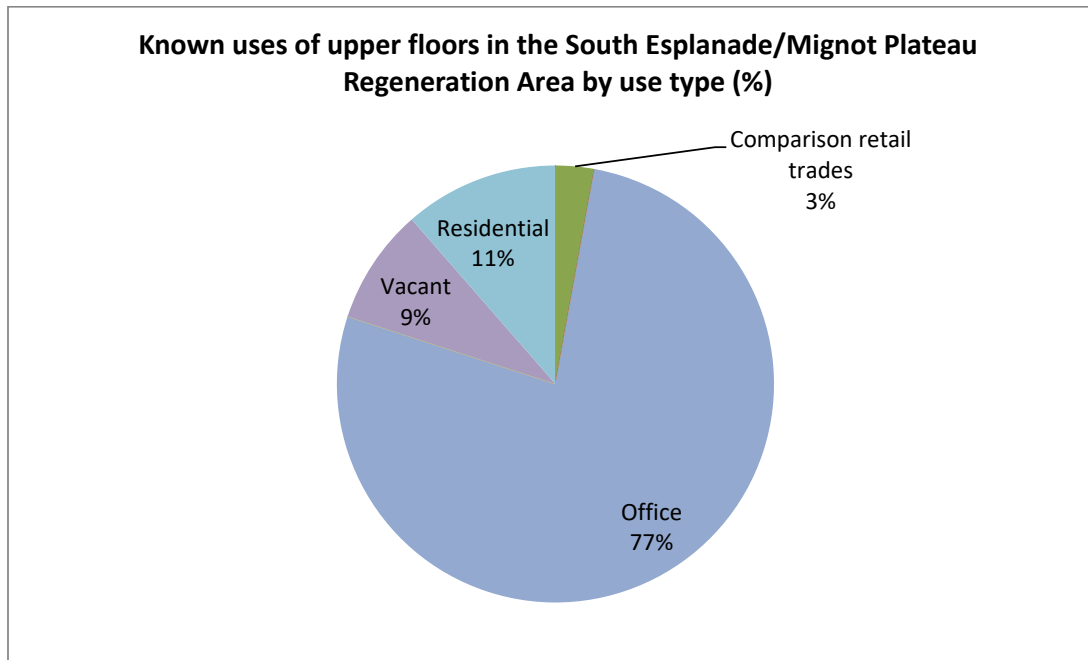


Figure 14: Percentage of upper floor units in different uses within the South Esplanade/Mignot Plateau Regeneration Area, where known, 2018

The upper floor uses differ from the 2017 data, again largely because of the improved accuracy of the data. That said office use remains the predominant upper floor use, followed by residential use. As with other findings this is reflective of the spatial distribution of offices within Town.

Opening Hours

There are several units open on Sunday within the Regeneration Area, including Town Church, Tuck Shop and Bus Information shop. The Terrace restaurant and bar is open in the evenings, though opening is seasonal.

Footfall counts

As with 2017, the highest footfall counts occurred in the middle of the day, coinciding with lunchtime. However unlike the 2017 data, the highest counts were recorded on a Saturday, not during the week. This was also the case with the Mansell Street/Le Bordage Regeneration Area counts and again highlights the importance of interpreting the data with caution, given there is only two years' worth of information. However it is also noted that this years' Saturday footfall count coincided with the Guernsey Yacht Club Regatta which might have influenced numbers. Consistent with last year, the early evening count in this area was the highest in Town, possibly reflecting the role of the area in transport terms with people accessing the bus terminus and parking, as well as recognising that there are several bars and restaurants to the south of the Regeneration Area with extended opening hours. Again the Guernsey Yacht Club Regatta may have influence numbers.

Building condition

The building condition in this area was in the majority good, and this had increased from 50% in good condition in 2017 to 63% rated as good in 2018. This is largely as a result of

improvements to the Albany building, with new occupiers including filling the previously vacant unit (see [Figure 15](#) below).

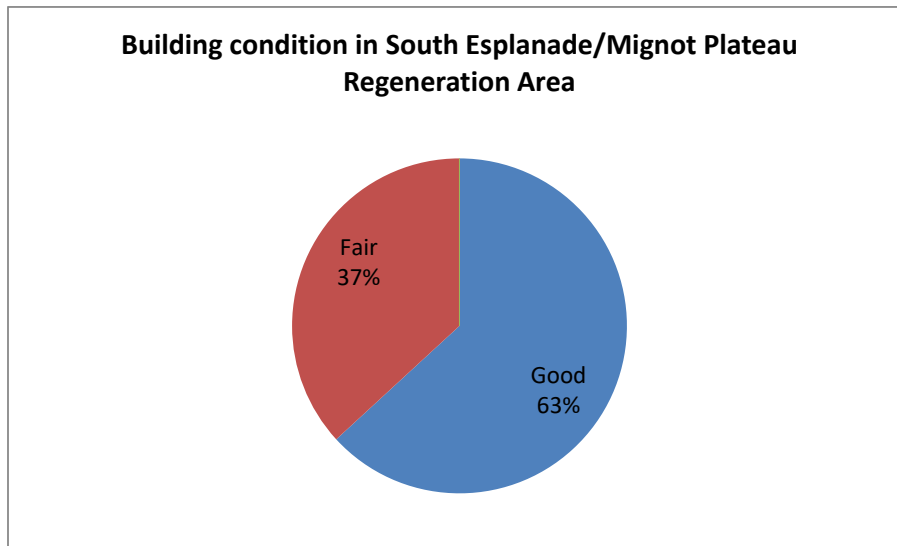


Figure 15: Building condition in South Esplanade/Mignot Plateau Regeneration Area

Façade Activation

The Façade Activation assessment found none of the very high quality units that make up much of the Core Retail Area (1: Vibrant), however individually, there were several that were rated as active, being transparent and relatively small. However the overall picture was one where the units lacked detail and did not display the same level of interest as found in other areas of Town. The buildings rated 5: Monument included Town Church, the public toilets and Picket House (Trafalgar Travel).

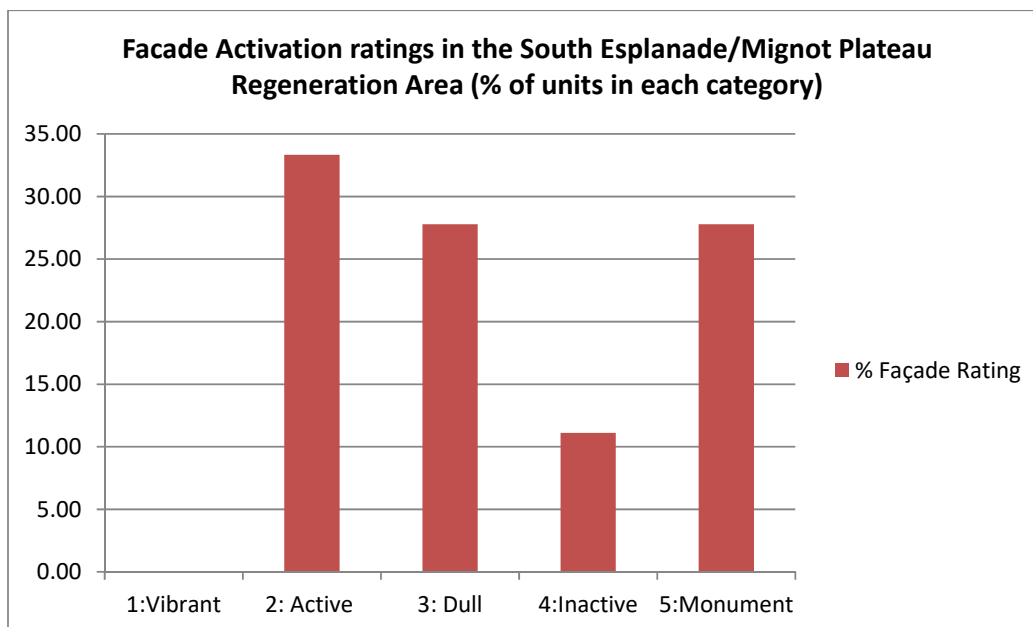


Figure 16: Façade Activation ratings within the South Esplanade/Mignot Plateau Regeneration Area 2018

Public Realm

The public realm findings for the area were interesting as there are several distinct areas within the Regeneration Area, including the bus terminus; the harbour side; the shops and services of South Esplanade; the area around the public toilets and Picket House; and Mignot Plateau.

The bus terminus is isolated from the shops and facilities of South Esplanade and from the harbour by roads all around it. The terminus area is therefore predominantly used by people intending to travel, and, to a lesser extent, by young people chatting with friends but not necessarily waiting for transport.

The bus terminus and shops/cafes on South Esplanade have views across the harbour, but these are obscured by the parked buses and multiple lanes of traffic, again isolating the bus terminus from its surroundings. There are several areas of conflict between pedestrians and cars, notably outside the Albany building, as people cut across two lanes of traffic, as well as negotiating the walled planting in the middle, to get to the bus terminus from the shops and bus information office.

Another difficult area is accessing the bus terminus from the southern end, with no dedicated crossing point from the harbour or shop side of South Esplanade, and multiple lanes of traffic, parked cars and walled planting areas all forming barriers to pedestrians.

Alongside the harbour there is a well-used footway marked by a post and chain fence, which links the Albert Pier with the Castle Emplacement. There are views across the harbour from this footway and people often pause to look at the boats, creating pinch-points if people are trying to pass one another. Given the importance of this route in linking Castle Cornet to Town, opportunities to improve the pedestrian environment here could be beneficial, possibly capitalising on the view and the inclination of people to stop along here.

In front of Woodies coffee shop, outside the Picket House (Trafalgar Travel) there is a small area with seating and bicycle parking which appears to be well used by passers-by. However the environment could be improved, as it is currently cluttered and uninviting, and there is potential for it to become a valuable public space. Enlarging the pedestrianised area and creating pedestrian-friendly links to Church Square could be of particular benefit. At Mignot Plateau there are impressive views of Town and the Islands, and there could be potential opportunities to derive more benefit from these panoramas.

Summary

Overall the appearance and general feel of the South Esplanade/Mignot Plateau Regeneration Area is not as attractive as the Core Retail Area, and there are units whose condition could be improved. The environment around the bus terminus is cluttered and is dominated by traffic, so there are clear opportunities for improvements. However, the vacancies are low in the area and the high volumes of people using the bus terminus gives the area a busy, if not vibrant, feel.

Goad Categorisation of Uses in the 'Town Centre' Area

In the 2017 survey, the Goad categorisation system was applied to the Core Retail Area. Goad categories group similar uses whilst also providing a greater level of detail to build a more in depth picture of what makes up a Town Centre. In order for the data to be comparable with town centres in other jurisdictions the system needed to be applied to the main retail areas of Town which extends beyond the Core Retail Area. Based on the Goad maps included in the Roger Tym Report (2010⁷) and refined to reflect the current situation, Goad data was collected for a wider area which encompassed the Core Retail Area, parts of the Regeneration Areas and some of the Main Centre Inner Area.

Not all town centre uses are categorised, only those as shown in the [Table 1](#) below, which includes the percentage of units within the 'town centre' area ' within each Goad class.

⁷ The Roger Tym & Partners Retail Study (2010) was one of a number of sources of evidence that informed the 2013 'Retail Strategy for Guernsey' and subsequently the development of retail policy within the IDP 2016.

Table 1: Goad categorisation of the main retail areas of Town

Use	Goad Category	Percentage
Bakers	G1A	0.00
Butchers	G1B	0.29
Greengrocers & Fishmongers	G1C	0.00
Grocery, Frozen Food & Supermarkets	G1D	3.47
Off Licence and Home Brew	G1E	0.58
Newsagents, Confectioners & Tobacconists	G1F	2.60
Footwear, Cobblers	G2A	2.02
Men's & Boys wear	G2B	1.45
Women's , Girls and Children's Wear	G2C	6.07
Mixed and General Clothing	G2D	6.36
Furniture, Carpets & Textiles	G2E	3.47
Booksellers, arts/crafts, Stationers, Copy Bureaux	G2F	3.47
Electrical, Home Entertainment	G2G	2.31
DIY, Hardware, Household Goods	G2H	0.87
Gifts, China, Glass and Leather Goods	G2I	4.62
Motor Accessories, Car, Motorbike or Boat Sales	G2J	0.29
Pharmacy, Toiletries, Opticians	G2K	4.05
Department, Variety and Catalogue Stores	G2L	2.02
Florists	G2M	0.29
Sports, Toys, Cycles & Hobbies	G2N	2.89
Jewellers, Clocks & Repair	G2O	5.20
Charity Shops, Pets and Other	G2P	1.73
Hot food Takeaway, Sandwich Shops, Cafes, Restaurants	G3A	17.92
Hairdressers, Barbers, Beauty Salons	G3B	7.80
Dry Cleaners, Laundrette	G3C	0.58
Travel Agents	G3D	0.87
Banks, Accountancy, Financial Services	G3E	3.18
Building Societies	G3F	0.00
Auctioneers, Estate Agents	G3G	1.45
Post Office, Employment, Careers and information	G4A	2.02
Vacant	G4B	12.14
Total		100.00

This breakdown of information indicates a diverse retail offering, with 27 of the categories out of 30 represented (excluding vacant units). The categories which are not represented are Building Societies, Bakers and Greengrocers & Fishmongers, suggesting perhaps that there could be scope for additional convenience retail in Town which reflects the findings of Roger Tym & Partners in their 2010 report.

Within the Goad area as a whole, the Hot Food Takeaway, Sandwich Shops, Cafes & Restaurants category has the highest representation, with approximately 17.9%. Vacancies

represent the next largest percentage, with approximately 12.1%. This figure is higher than that for the Town Core Retail Area, as for the purposes of the Goad categorisation the area to which Goad has been applied includes areas with multiple vacant units, such as Mill Street, Fountain Street, Le Bordage and Lower Pollet. The UK Town Centre average vacancy rate for the second half of 2017 was 11.2%⁸. For comparison, at the time of the last comprehensive Goad survey of Town, as part of the Roger Tym & Partners Guernsey Retail Study, 2010, 14.6% of units were recorded as vacant, compared to the UK average of 11.4%, representing an improvement locally and a smaller improvement nationally.

Town Main Centre: Overall Summary and Conclusions

Town remains the Island's primary retail centre and the Core Retail Area appears to be functioning well despite a rise in vacancies. The spatial distribution of non-residential uses remains appropriate, with retail focused in the Core Retail Area. The Main Centre Inner Area and Regeneration Areas contribute a supporting role with a diverse mix of uses, enhancing the vitality and viability of the broader Town area. Each of the Regeneration Areas would benefit from inward investment so their designation remains relevant.

Listed on page 3 of this report are several factors which underpin vitality and viability. These are:

- Diversity of uses
- Footfall and accessibility
- Occupied versus vacant space
- Quality of buildings and space
- Popularity of the centre with those who live, work or visit there.

These are each considered briefly in turn to give an overall indication of the current vitality and viability of Town.

Diversity of uses

The use survey, coupled with the Goad data, shows diversity in the retail offering of Town complemented by supporting uses such as restaurants, cafes and banks. Visitor attractions and public amenity uses such as Guille-Allez library, Castle Cornet and facilities of La Vallette broaden the range of uses for both residents and visitors.

As discussed in 2017, the use survey highlights the different functions of the Regeneration and Core Retail Areas, with the Town Core Retail Area having by far the highest percentage of comparison retail units, though the Mansell Street/Le Bordage Regeneration Area is also predominantly in retail use. The Lower Pollet Regeneration Area has the highest percentage of restaurants/cafes/pubs, whilst the ground floor uses of South Esplanade are more varied. There are no significant changes to the balance of uses since the 2017 survey.

The Core Retail Area has the greatest proportion of retail uses on upper floors, with South Esplanade having a high proportion of offices on upper floors. There are also a significant

⁸ From House of Commons Briefing Paper: Retail Sector in the UK. October 2018:
<https://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN06186>

proportion of offices on the upper floors within the Lower Pollet Regeneration Area whilst the upper floors of Mansell Street are predominantly in residential use. The quality of this part of the evidence base has been significantly improved since 2017.

Overall there appears to be no major gaps in provision and the different areas appear to complement each other in terms of offering, so it can be reasonably concluded that Town scores relatively highly in terms of diversity of uses.

Footfall and accessibility

The indicative footfall counts continue to suggest a positive impact of office workers during the week, given the higher numbers recorded at lunchtimes, but in 2018 there were also high counts on Saturdays, not just Monday-Friday. The impact of cruise visitors on footfall numbers is clear and makes a positive contribution to the vitality of Town and the overall feeling of busy-ness, though clearly this is a seasonal impact, and as noted above, the Saturday counts in 2018 coincided with the Guernsey Yacht Club Regatta. Improvements continue to be made to improve accessibility in the wider Town Main Centre area, including additional accessible parking bays, pavement improvements and changes to bus timetables. However improvements could still be made, for example to pedestrian and cycle infrastructure, and this is potentially an area where Town does not rate so highly. The Harbour Action Area will play a vital role in addressing accessibility issues and improving access for all.

Occupied versus vacant space

The number of units recorded as vacant in both the 2017 and 2018 surveys are shown in Figure 17.

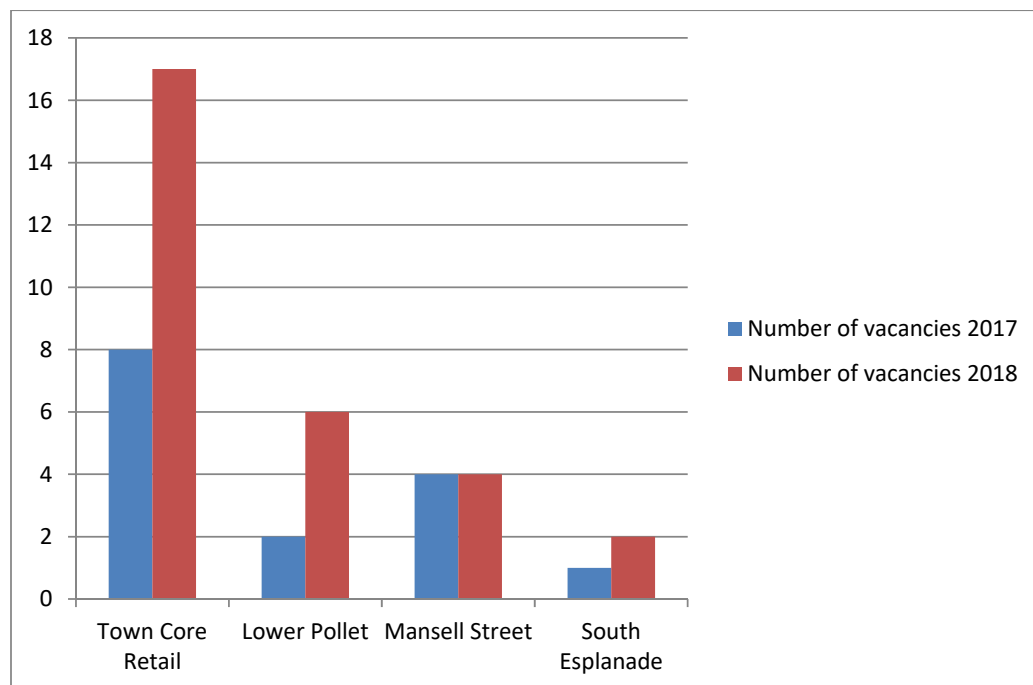


Figure 17: Number of vacant units by designation in 2017 and 2018

In terms of the numbers of vacant units, the Town Core Retail Area showed the greatest increase in the number of vacant units, however according to the Goad data, this has fallen since 2010. The data represents a snap shot in time and informal observations since the survey reveal that many of these vacancies have now been filled, but that equally there are other properties that have become vacant since the time of survey. Without detailed surveys with landlords and retailers it is difficult to know what the reasons are for the increases in vacancies. These surveys will, of course, continue to monitor the situation.

Despite some increases in vacancies, the condition of vacant units was still high in the Core Retail Area and didn't give a 'run-down' impression, however this was not the case in the Regeneration Areas where vacant units were more likely to detract from the attractiveness of the area.

Given that the number of vacancies has risen since 2017, the issue of occupied versus vacant space is one to keep monitoring and the impact on vitality and viability appears to vary according to area.

Quality of buildings and space

The building condition surveys indicate a high level of care for the built environment, with few units in poor condition. The façade activations survey similarly highlighted where there the high quality of the built environment, but also where there are facades that were rated as 'dull' or 'inactive' and this suggests parts of Town where investment might be beneficial. The historic environment of Town and the evidence of investment through bunting, floral displays and street entertainment provide an attractive and pleasant environment.

Town also offers areas of high quality public realm but there are clear opportunities for improvement, with an overriding issue being the dominance of traffic, reducing the attractiveness of the environment for all.

Within the Main Centre but not specifically surveyed are also Candie Gardens and Cambridge Park, both of which offer high quality publically accessible open space. Both areas are also designated as Important Open Land, Candie Gardens because of its importance as a recreational resource and a 'green lung' in Town, as well as being an important landscape feature and a longstanding part of the structure of the settlement. Cambridge Park has been recognised as an important recreational resource which also creates an attractive setting to this part of Town.

Overall the quality of the built environment is high, but the public realm is often dominated by traffic which reduces its attractiveness and negatively impacting on vitality and viability.

Popularity of the centre with those who live, work or visit there

Given the lack of feedback from visitors and locals this year, it is hard to draw conclusions on the popularity of Town. However as noted Guernsey won a prestigious cruise award in 2018 for the third time and the initial finding of the Better Life Indicators Report gave relative performance as 'good' or 'very good' in relation to the economy, quality of life and our place in the world. It may be that in 2019 it is considered appropriate to assign more

resources to obtaining feedback in order to inform this area of assessment related to vitality and viability to get a fuller picture, but that would be dependent on other priorities.

Conclusion

St Peter Port Main Centre appears to be functioning well with an appropriate spatial distribution of uses. There are clear strengths to build on, such as the diversity of uses and quality of the built environment as well as weaknesses to address such as those relating to the public realm and accessibility. Vacant units are an area which will continue to be monitored for impact and trends. Opportunities for improvement can also be observed, such as where building condition is fair or poor rather than good, or where units are considered dull or inactive. Investment in these areas is likely to provide wider economic, social and environmental benefits in terms of increasing the attractiveness of areas of Town for both locals and visitors. Whilst open public spaces are limited particularly in the centre of Town, Candie Gardens and Cambridge Park, for example, provide high quality spaces and the Harbour Action Area has the potential to improve public realm around the harbour area.

St Sampson/Vale (The Bridge)

The Main Centre of the Bridge includes a Core Retail Area designation, one Regeneration Area (Leale's Yard), as well as Housing Allocations, Key Industrial Areas, Key Industrial Expansion Areas, Important Open Land and the St Sampson/Vale Harbour Action Area. These designations are shown on the extract from the IDP Proposals Map, shown in **Map 3** (page 6). Around the harbour area, the Bridge has an industrial character, whilst the Main Centre Outer Area is predominantly residential.

The 2013 Retail Strategy⁹ considered that the Bridge area was generally not performing as well as it could as a retail location at that time. The Strategy noted two factors that might positively influence the area – the high population level located close to the Bridge, and the potential redevelopment of Leale's Yard. The Strategy also noted that the main part of the Bridge shopping area appears to be dominated by charity and 'value' shops, with Southside offering little to entice the shopper looking for comparison goods.

As with Town, there was limited feedback this year however the Guernsey Press carried an interesting report following the expiry of outline planning permission at Leale's Yard in August 2018. Whilst not representative, the small sample of interviewees in the article referred to pedestrianisation of the retail area to allow for alfresco dining and cafes, relocating parking to Leale's Yard and attracting more people to the area in the evening¹⁰.

General feedback throughout 2018 on the Bridge Main Centre has been dominated by concerns relating to perceived over-development of housing and associated problems with traffic and accessibility. This relates primarily to the delivery of housing sites including the Pointues Rocques and Cleveleys housing allocations, as well as windfall sites in the area. This topic of housing will be discussed in detail in the 2018 Annual Monitoring Report, including a review of planning permissions and completions. The Main Centres Thematic Report, as part of the AMR, will review non-residential planning applications within the Bridge Main Centre.

The Bridge Accessibility

The Bridge is linked to St Peter Port by the main Inter Harbour Route along the east coast. There is a cycle lane along part of this route (Bulwer Avenue to the Weighbridge roundabout in Town) and improvements have been made to enable easier access to the cycle lane at Bulwer Avenue through the installation of a crossing point at the southern end of Les Grandes Maisons Road. This includes new dropped kerbs and blister paving, improving access for both cyclists and pedestrians. At the end of 2018, this infrastructure was in place and became functional in January 2019. New dropped kerbs were also installed at the Bulwer Avenue/Longue Hougue Lane junction.

⁹ 'A Retail Strategy for Guernsey', December 2013, was approved by the former Commerce and Employment Department and informed the development of retail policy in the IDP 2016.

¹⁰ See <https://guernseypress.com/news/2018/08/31/bridge-users-still-want-to-see-the-area-revitalised-by-co-op/>

The consultation to extend the 25 mph speed limit for ‘community hub areas’ included proposed changes to a number of speed limits in the Bridge Main Centre and Main Centre Outer Areas and this came into force in April 2019.

The bus routes have changed since 2017, including the introduction of an additional route which serves the Bridge (route 13). In total, there are 7 routes, including the N1 night bus, that serve the Bridge Main Centre Inner Area (including the Core Retail Area and Leale’s Yard Regeneration Area). In addition, another bus (21) serves Halfway and the Braye Road crossroads in the Bridge Main Centre Outer Area.

The route by bus to and from Town to the Bridge Main Centre is well served and access to the north of the island from the Bridge (to Vale Church, L’Islet and L’Ancresse, for example) is also relatively straight forward. However the only access direct from the Bridge to other parts of the island is by the hourly round island bus (route 92) or the less frequent P2, with the result that it is harder to make use of public transport links. The only direct connection from the Bridge to the airport, for example, is via the 92 which takes one hour, and connections to the Princess Elizabeth Hospital are via the P2 which runs approximately every 90 minutes.

Other transport options include the small taxi rank on The Bridge, close to the Marine & General buildings opposite Boots the Chemist. There are cycle stands at either end of the main shopping area, outside Kwai Chinese Takeaway at one end and outside Costa Coffee at the other end of The Bridge. The location of additional cycle stands is shown in [Appendix 3: Location of Cycle Stands](#), including at Delancey Park. Dedicated motorcycle parking is available on The Bridge near Boots the Chemist as well as on Northside. Disabled parking spaces are also located on The Bridge near Hansen’s sandwich shop.

Pedestrian and cycle routes have not been mapped but it is known that pedestrian movement is hindered in the central area of The Bridge both by traffic flow and parked cars as well as narrow pavements, for example on Nocq Road.

As well as the connections on land, St Sampson’s Harbour provides marina spaces for local yachts and motor boats, as well as providing access for liquid fuel ships berthing at high tide.

Related to accessibility, St Sampson’s Douzaine took over and re-opened the toilets at Le Crocq, South Quay, in September 2018.

The Bridge Main Centre Inner and Main Centre Outer Areas

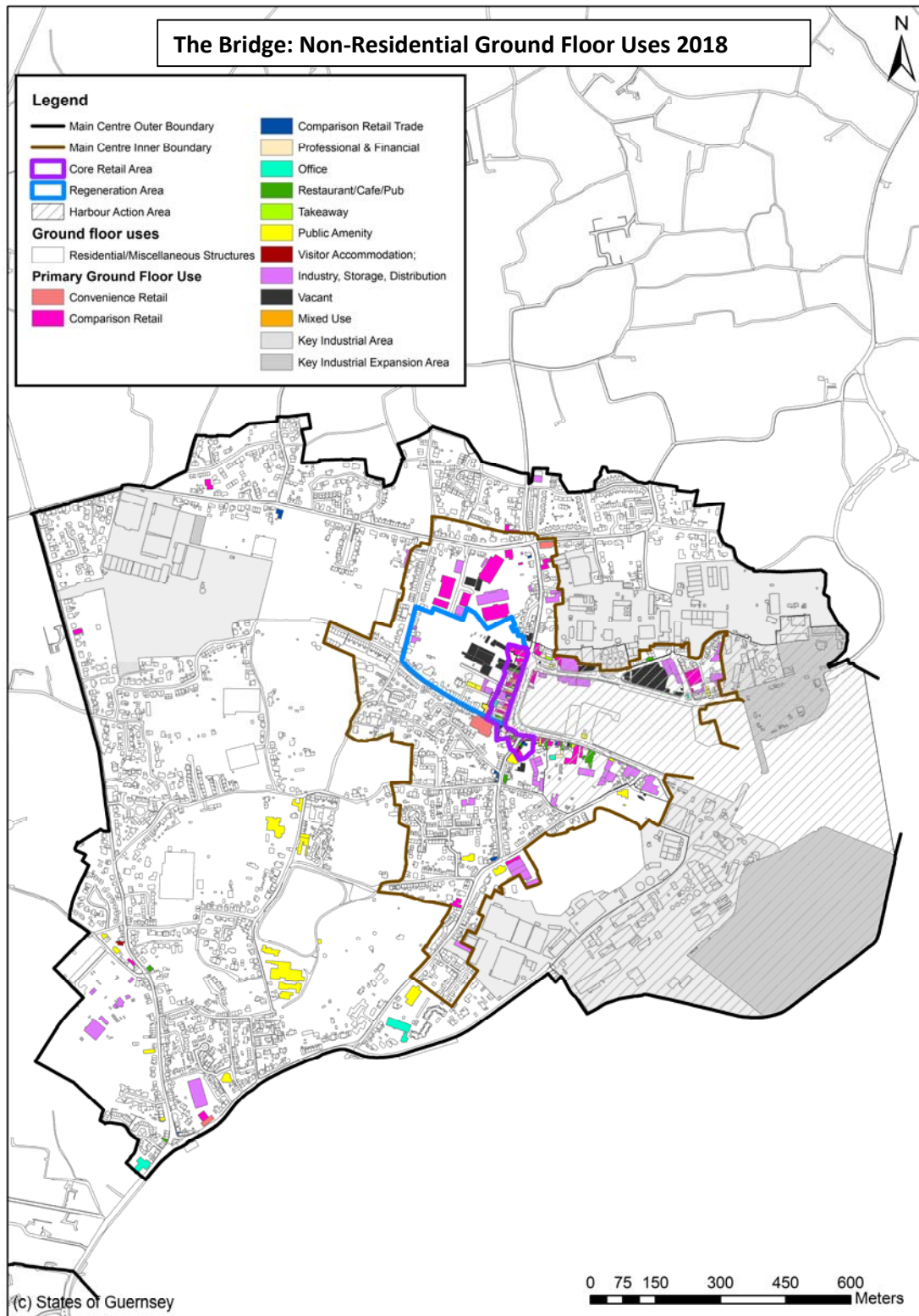
As shown in [Map 10](#), within the Main Centre Outer Area, there are several public amenity uses, such as St Sampson High School, St Mary and St Michael RC Primary School and Guernsey College of Further Education Delancey Campus which are located to the south west of the Main Centre Outer Area. There are a few other non-residential units along the Traffic Priority Routes of Vale Road/Route Militaire and La Route du Braye.

Overall, industrial, storage and distribution uses form the majority of the non-residential uses in the Main Centre Outer Area, due to the presence of the Key Industrial Areas. However buildings falling within the areas designated as Key Industrial Areas and Key

Industrial Expansion Areas were not individually surveyed – this will form part of the full IDP 5 year review of the Employment Land Supply – so there is no further analysis of those areas within this report.

Within the Main Centre Inner Area the non-residential uses are focused around the Core Retail Area, and particularly around Southside and Northside, as well as the Lowlands Road Industrial Estate. There is a notable absence of office uses in contrast to Town, and there are more industrial, storage and distribution uses around the central part of the Bridge Inner Area than found in Town, where offices tend to be more dominant.

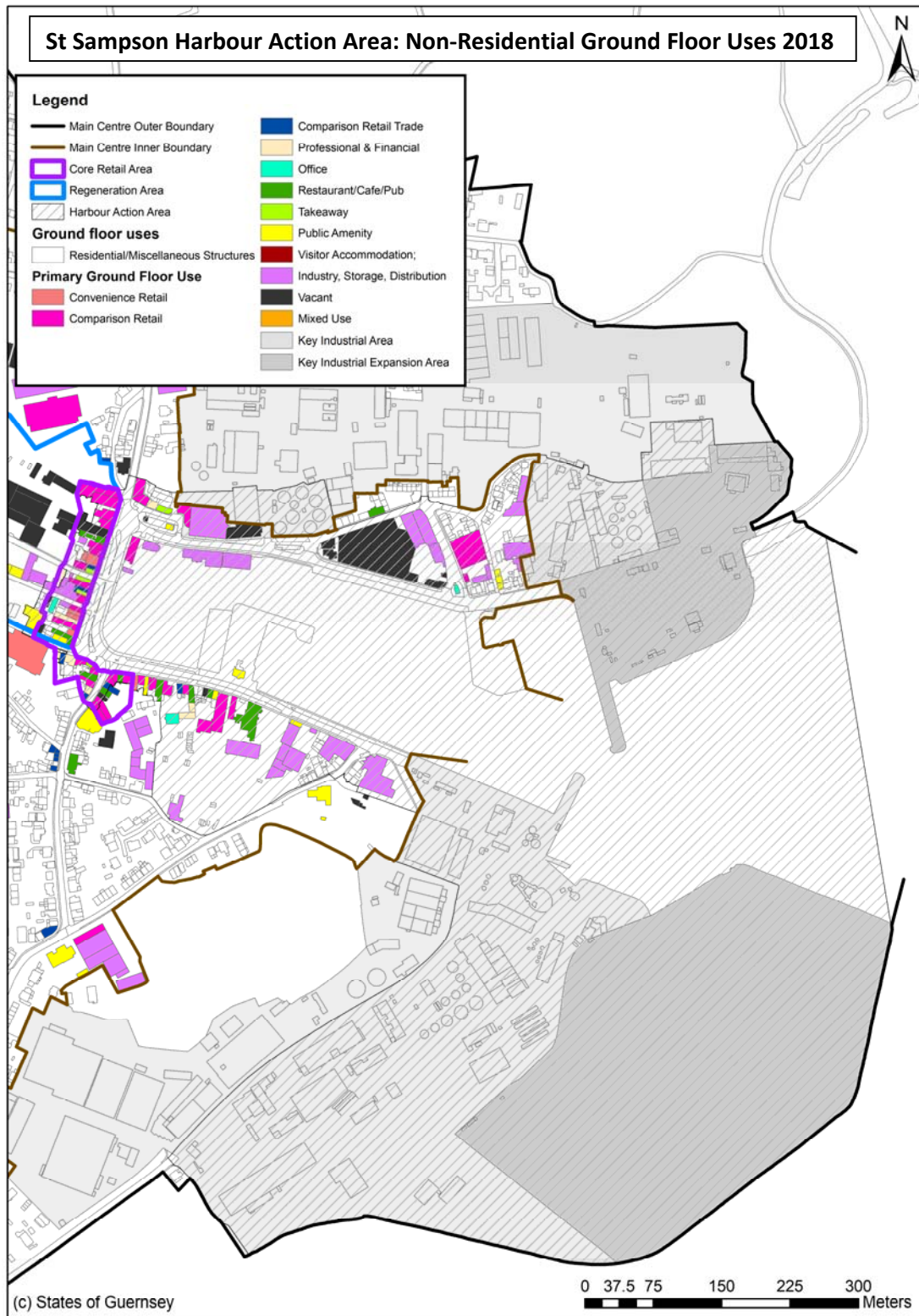
Referring back to image 2 of this report, there is a large swathe of Important Open Land designated within the Main Centre Outer Area, running alongside the Main Centre Inner Area boundary. This land is protected from insensitive or inappropriate development because of its importance in enhancing the openness, landscape character and visual quality of the area.



Map 10: Non-residential ground floor uses in The Bridge Main Centre 2018

St Sampson Harbour Action Area

The St Sampson Harbour Action Area covers a large part of the Key Industrial Area at Longue Hougue, and extends to include South Quay, The Bridge and Northside. [Map 11](#) shows the designation in context (the Harbour Action Area is shown with a grey diagonal line throughout).



Map 11: Non-residential ground floor uses in St Sampson Harbour Action Area 2018

The outer edges of the Harbour Action Area accommodate predominantly industrial uses, but the designation also includes both South Quay and The Bridge Core Retail Area. As such

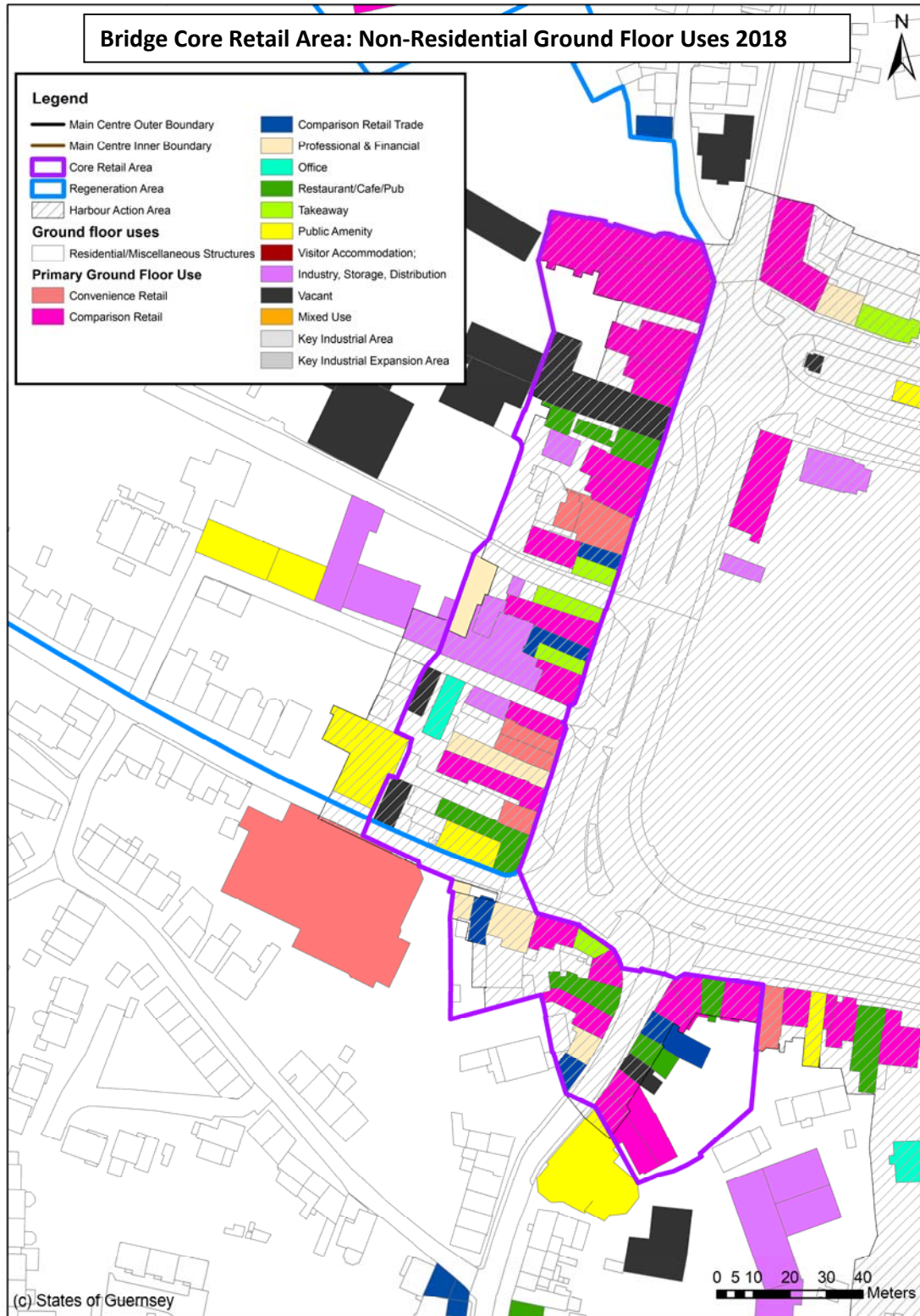
there is a diverse range of uses within the Harbour Action Area, incorporating the commercial harbour, retail, restaurants, cafes and pubs, leisure and recreation (e.g. the marina) and other complementary uses. The former Quayside retail unit forms a significant vacancy within the Harbour Action Area.

Whilst St Sampson's Harbour area has developed to be predominantly industrial, the leisure marina occupies a large area of the harbour and opportunities for other uses within the Harbour Action Area such as residential, recreation and leisure will be explored through the Harbour Action Area Local Planning Brief process, identifying opportunities for improvements to public realm and addressing the negative impacts of traffic, as well as providing for development to attract inward investment to secure such improvements.

The Bridge Core Retail Area

The Bridge Core Retail Area extends from New Road to the junction of Vale Avenue. There are fewer units and a smaller land area within the Bridge Core Retail Area compared with the Town Core Retail Area, consistent with the requirement in the SLUP that Town is maintained as the primary retail centre.

Map 12 shows the extent of the designation (shown outlined in purple), with the Leale's Yard Regeneration Area shown outlined in blue.



Map 12: Non-residential ground floor uses in the Bridge Core Retail Area 2018

In 2017 there was a cluster of vacancies at the northern end of The Bridge, but these have largely now been filled and since the time of survey, an additional unit shown as a vacancy on [Map 12](#) has been refurbished and re-opened as the Co-Op Locale. The former Health Information Shop, which in the last survey was recorded as vacant, has this survey been recorded as a retail unit as it appears to still be occupied. However in terms of new vacancies recorded in 2018, there are several on the periphery of the Core Retail Area (New Road, Nocq Road and Commercial Road).

Ground floor uses

Figure 18 shows the breakdown of uses by type at ground floor level in the Core Retail Area by percentage.

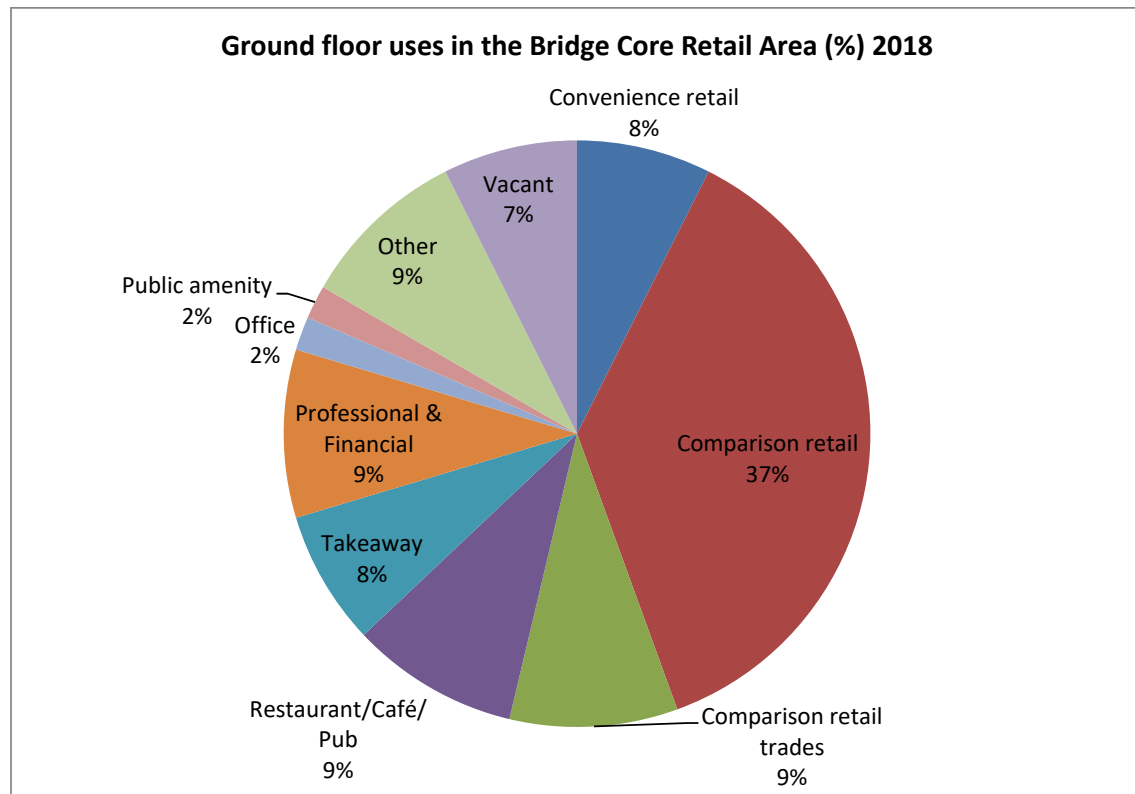


Figure 18: Percentage of ground floor units in each use within the Bridge Core Retail Area

Despite several vacant units being filled since 2017, there has been an overall increase in vacancies since 2017. Notwithstanding, retail uses remain dominant in the Core Retail Area, although the increase in vacancies has resulted in a reduction in the percentage of units in active retail use, from 60% in 2017 to 54% in 2018. As the total number of units in the Core Retail Area is relatively small, this equates to a change to just 4 units. The majority of units are still either in active retail use or in retail use but vacant. The combined total of units either in active retail use or vacant but last in retail use is 61%.

Whilst the vacancies mean that there are less retail units in active use, retail is still the dominant use in the Core Retail Area with appropriate proportions of other uses supporting that function. The use of the vacant units will continue to be monitored in future reports.

As in 2017 this information appears to indicate a good mix of uses within the Core Retail Area, which is predominantly retail but complemented by appropriate supporting uses.

Upper floor uses

Figure 19 below shows the percentage of known uses on upper floors within the Bridge Core Retail Area.

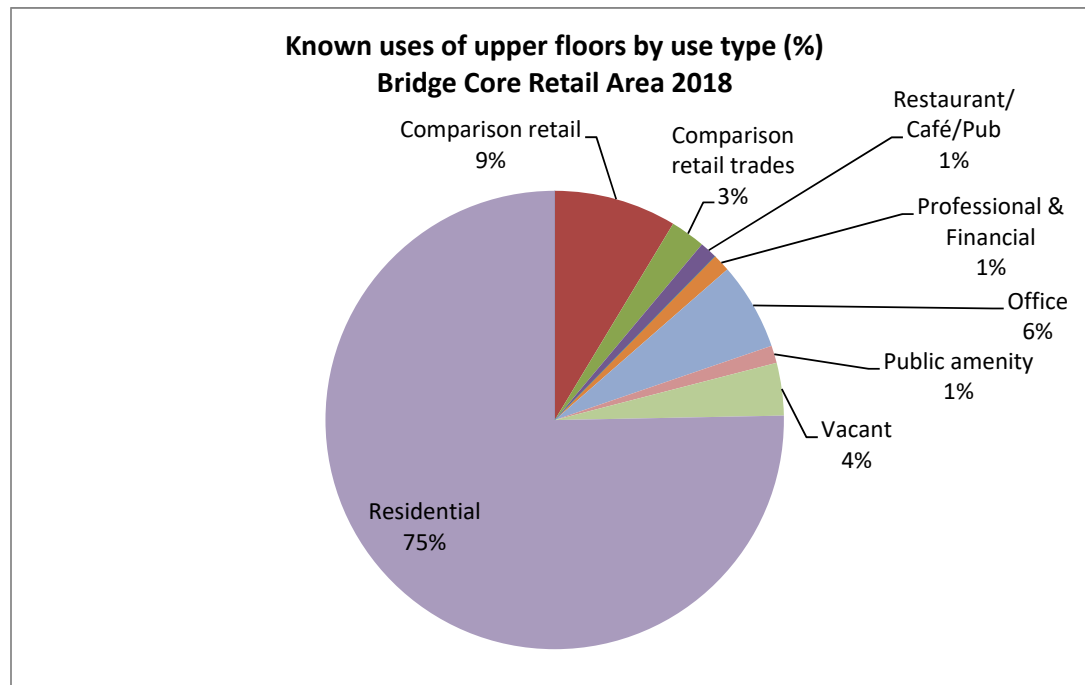


Figure 19: Known uses of upper floors by use type (%) in the Bridge Core Retail Area

As with the data for Town, the accuracy of the upper floors data for the Bridge is improved since 2017. Whilst there is a greater variety of uses on the upper floors than previously identified, the primary use remains residential. There is a small percentage of office use, as well as retail use ancillary to ground floor retail units.

Opening hours

Of the units where opening hours were known, there has been little change since 2017. Including upper floors as well as ground, 13% of units were open after 5pm and 15% were open on Sundays. The low evening footfall counts are likely to be indicative to be of the lack of evening and night-time economy.

Footfall Counts

The footfall counts in the Bridge Core Retail Area were generally higher at lunchtimes, and the highest counts were the Saturday counts which is consistent with the data from 2017. This could suggest that people working in the area during the week make less of a contribution to vitality and viability than people living locally who might be shopping at weekends. This could also be as a result of the limited office and service offering in this Main Centre which is, at present, disproportionate to the amount of residential uses with residents tending to commute to Town for some types of employment and services.

Building condition

Figure 20 shows the condition of units in the Bridge Core Retail Area.

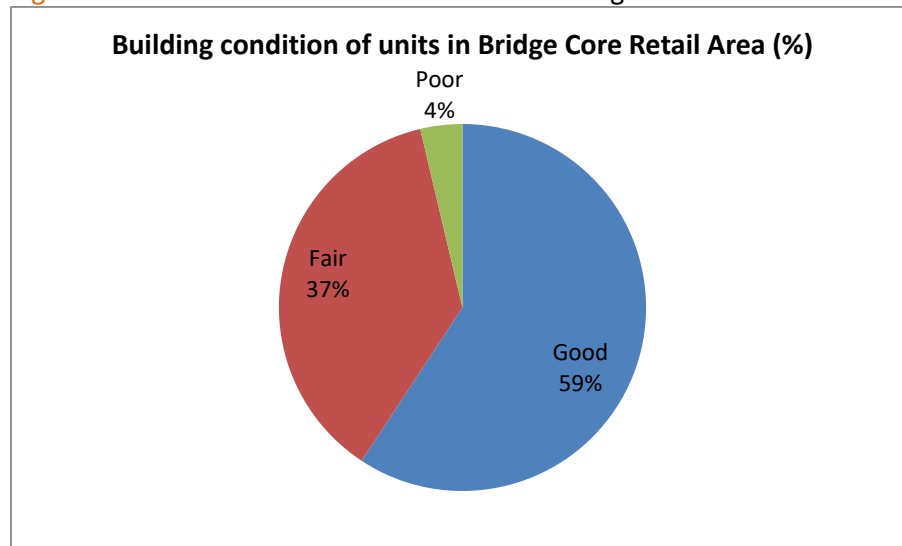


Figure 20: Building condition in the Bridge Core Retail Area

The majority of units in the Bridge Core Retail Area were, as in 2017, recorded as good condition and the number of units recorded as poor has decreased. However there was a significant increase in the number recorded as fair in 2018 compared to 2017. Whilst the overall picture remains positive, there is scope for investment in the Bridge to improve the appearance of the Core Retail Area.

Façade Activation

As with Town, following last year's trial of the Façade Activation study on a section of The Bridge, for 2018 the whole Core Retail Area was assessed during the survey. Buildings are given a façade activation rating as described in the Methodology section and [Appendix 2](#) of this report.

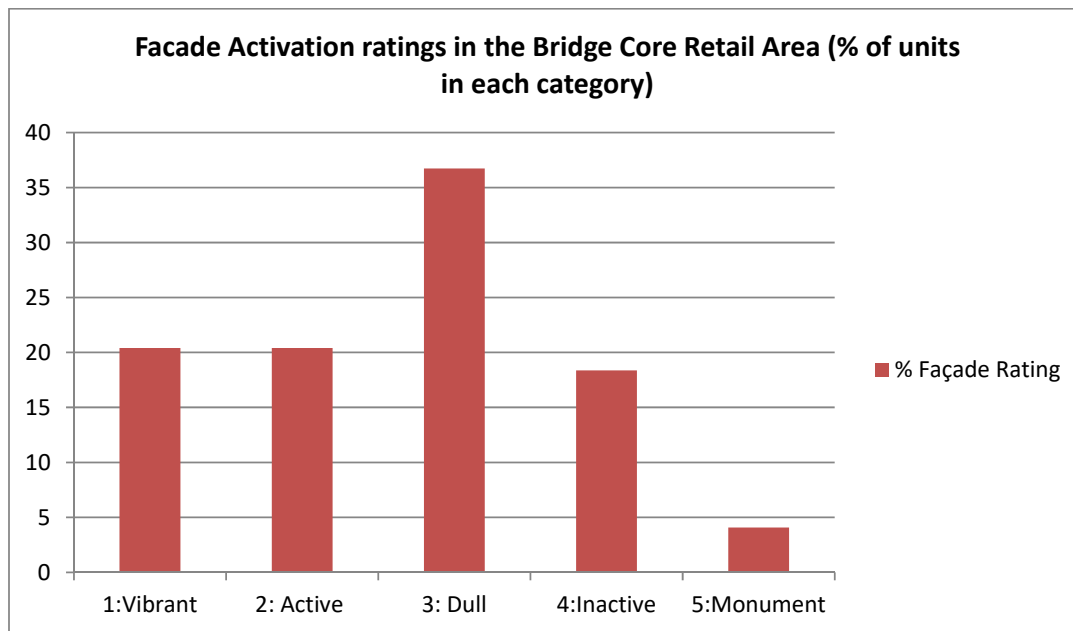


Figure 21: Façade Activation ratings within the Bridge Core Retail Area (% of units in each category)

A large proportion of buildings were considered 1: Vibrant or 2: Active (a combined total of 41%) reflecting the quality of the individual units. There is the potential to increase this rating further if the current vacancies are filled, as this included units of high potential. Ray & Scott and the Mariners Inn were recorded as 5: Monument, as whilst they may be limited in transparency, they both have historic facades that are visually remarkable. Approximately 36% of units (18) were rated as dull – these largely consisted of units that lacked transparency due to small or obscured windows, or those which lacked any interesting detail. There is scope to improve these units.

Public Realm

Public realm at the Bridge is limited in the Bridge Core Retail Area, but assessments were carried out in the area outside Northside Plaice fish and chip shop (outside, but close to, the Core Retail Area) and also in the pavement area outside Beekers, located on the corner of Commercial Road and The Bridge (7 The Bridge). A summary of the public realm observations are below. The location at Northside Plaice was chosen as there is a small pedestrianised area with a bench, as well as public toilets, so forms a notable area of public amenity space which is generally lacking in the Bridge. The location outside Beekers was chosen as it is close to a pedestrian crossing and it was anticipated that there would be a reasonable amount of pedestrian activity in the area as a result.

Beekers, The Bridge

This area is essentially a stretch of pavement, defined on one side by car parking and on the other by shops. As such the area is not intended to function as, for example, a public square might. The space is not particularly successful as a public space as there are no places to sit or chat and there is a low presence of vegetation. However the views across to the harbour are a positive feature, as are the interesting shop fronts and eateries (e.g. The Mariners,

Costa coffee, plus The Roll Bar and Hansen's sandwich shops), and there could be opportunities to enhance the space by taking advantage of these.

The area is dominated by traffic and people often park, go to one or two shops and leave again. There appears to be a relatively short stay of shoppers with limited dwell time.

Northside

Outside Northside Plaice on Northside there is a small area of public space with a bench, public toilets to the east and the former neighbourhood police office to the west. The area is dominated by traffic but has many positive attributes too. The planting and trees give the space an attractive visual environment, and it can be accessed via a pedestrian crossing. The uses near the square, particularly the bank with cash point and the fish & chip shop makes the area busy, but the limited size of the space makes it less useable than might otherwise be the case. Views to the harbour are restricted by the Marine & General Warehouses as well as the roads, and opportunities to spend time in the space are limited.

Summary

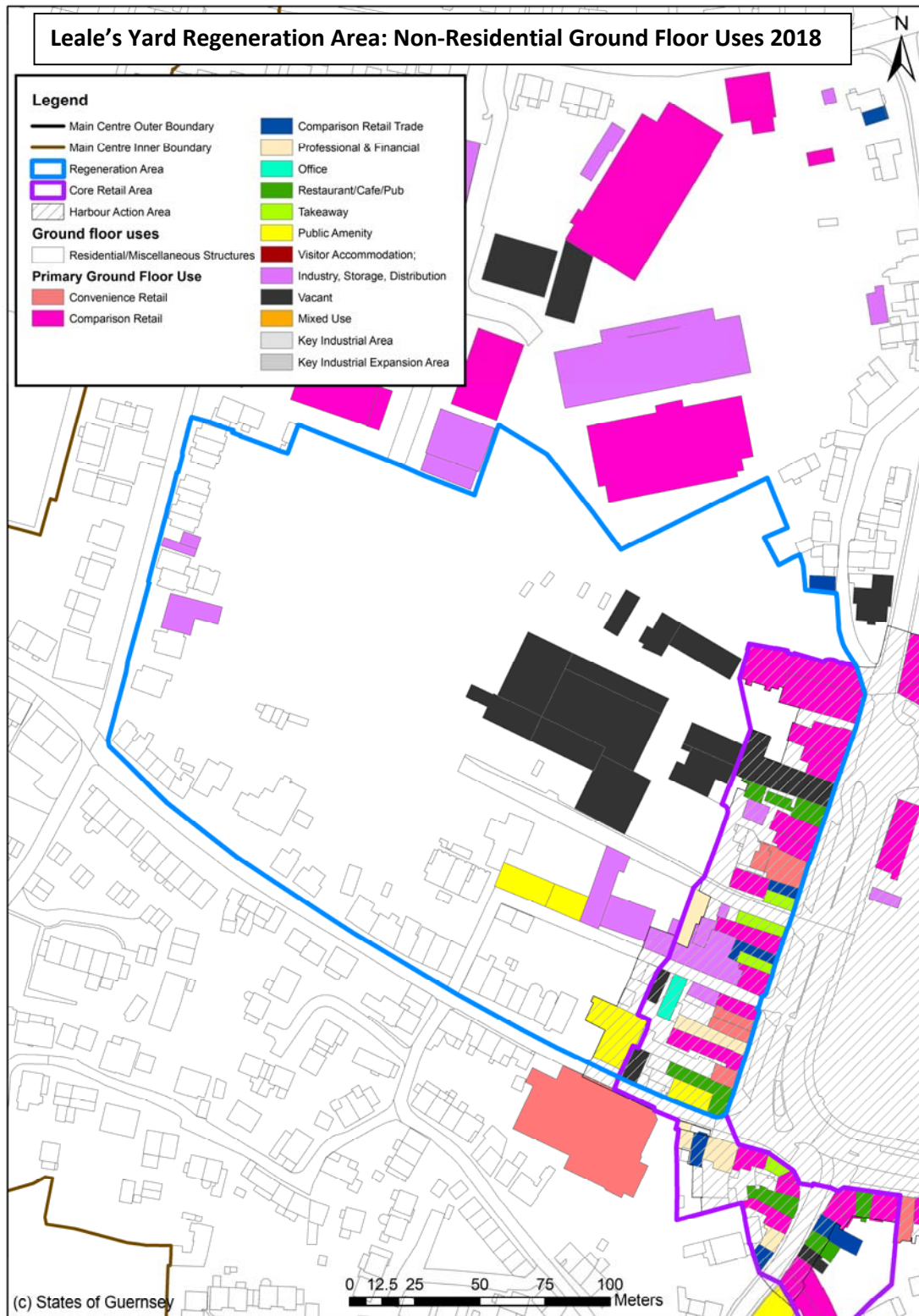
As in 2017, the overall impression of the Bridge Core Retail Area is not generally as positive as the impression of Town, primarily due to the dominance of traffic and lack of public realm. There is an appearance of visual clutter primarily due to the significant amount of signage in the area, a point which was highlighted by the St Sampson and Vale douzaines in early 2019 which has led to some rationalisation of signage and reduction of visual clutter., but there are many interesting buildings, a retail dominated main 'high street' and appropriate complementary uses. The Bridge has a busy feel despite the dominance of traffic and parking.

Leale's Yard Regeneration Area

The Leale's Yard Regeneration Area includes much of the Bridge Core Retail Area, plus residential properties and gardens on Nocq Road and Lowlands Road. The only additional non-residential units are the Salvation Army Community Centre (including café and charity shop), the pumping station on Lowlands Road and an engineering business, also on Lowlands Road. Buildings located in the inner area of the Regeneration Area (that is, behind The Bridge frontage and Lowlands Road) are generally in a poor state of repair.

In August 2018, the outline planning permission for 303 dwellings at Leale's Yard lapsed, though 109 dwellings on the site still have detailed planning permission. The Development & Planning Authority wish to prioritise the preparation of a Development Framework for this Regeneration Area, which can deliver key social, economic and environmental benefits to the Bridge Main Centre on previously developed 'brownfield' land and aims to bring this forward during 2019 providing there are the resources available to do so.

Map 13 below shows the Leale's Yard Regeneration Area outlined in blue.



Map 13: Leale's Yard Regeneration Area Ground Floor Uses 2018

The buildings shown in white are in residential use, so Map 13 shows quite clearly that residential uses line Lowlands Road and Nocq Road. Warehouses form the majority of

buildings in the rest of the designation with retail and retail trades, takeaways and a pub along The Bridge frontage itself (also within the Core Retail Area).

Ground floor uses

Figure 22 below shows the ground floor uses in the Leale's Yard Regeneration Area by percentage.

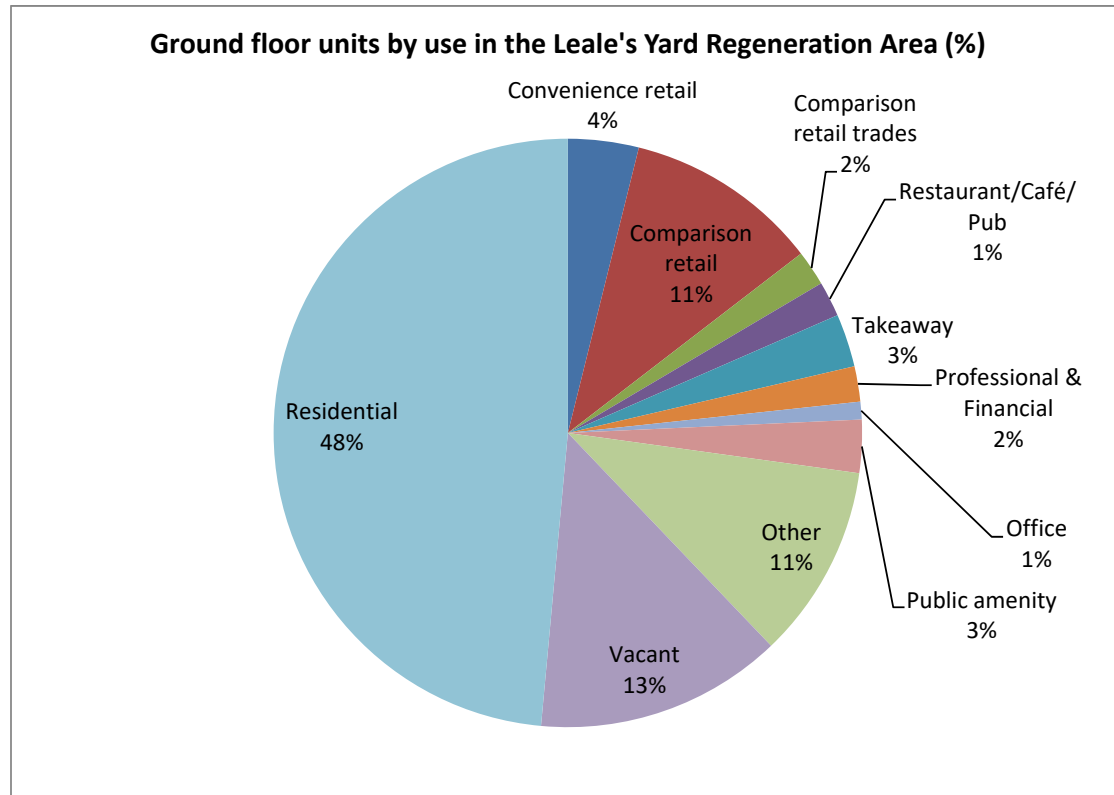


Figure 22: Ground floor units by use in the Leale's Yard Regeneration Area (%)

As in 2017, the majority of ground floor units are in residential use. The 'Other' category is predominantly industry and storage.

There are a high number of vacant (derelict) buildings within the Leale's Yard Regeneration Area which is unchanged since last year. There are three vacancies within the Regeneration Area which also fall within the Core Retail Area (the former Curiosity Shop, the former Tangles hairdresser and the former Guernsey Press shop). The former Guernsey Press shop has, since the survey, reopened as Co-Op Locale.

Upper floor uses

In terms of upper floors, Figure 23 shows the known uses of upper floors by use type.

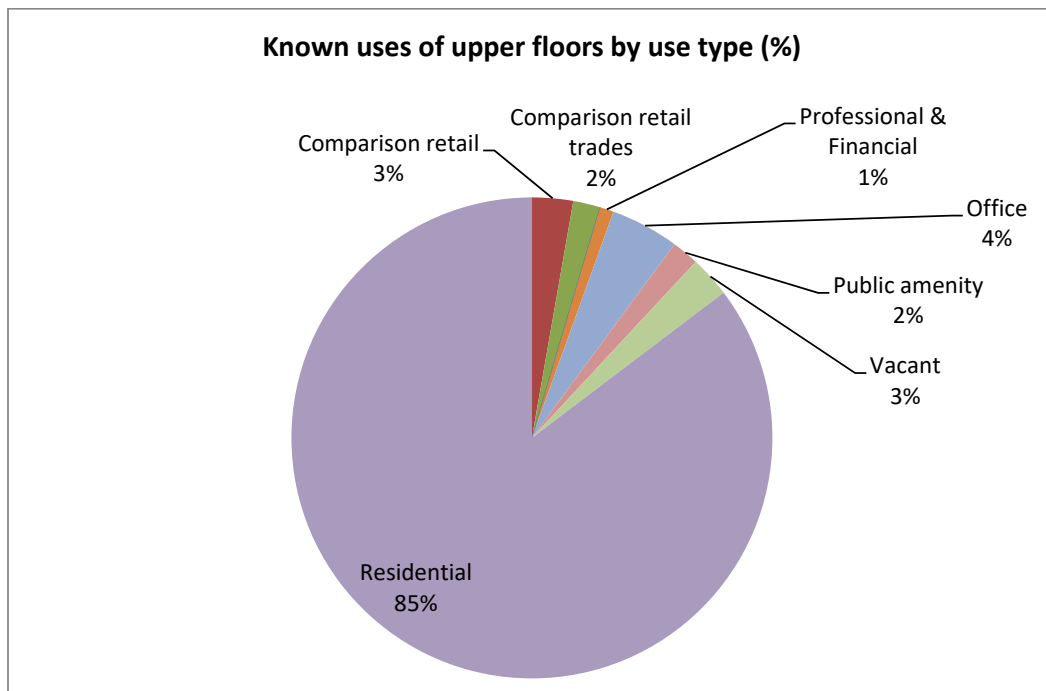


Figure 23: Known uses of upper floors by use in the Leale's Yard Regeneration Area (%)

As shown, there is a large proportion of residential use, which includes the upper floors of houses along Lowlands Road and Nocq Road, as well as residential uses on upper floors of retail units, for example. In contrast to the Regeneration Areas in Town, there is only a small percentage of office space recorded on upper floors.

Opening Hours

The opening hours of commercial properties in the Leale's Yard Regeneration Area reflect those of the Core Retail Area. The only other additional properties open to the public are the North Social Club and the Salvation Army Community Centre. The Salvation Army Community Centre is generally open Monday to Saturday inclusive. The exact opening hours of the North Social Club are unknown but are likely to include evenings and weekends, contributing to evening activity in the area.

Footfall Counts

One of the two footfall count locations within the Bridge lies within the Leale's Yard Regeneration Area (and Bridge Core Retail Area), with the results as described above, including higher counts on Saturday, as also reported in 2017.

Building condition

Figure 24 below shows the building condition within the Leale's Yard Regeneration Area.

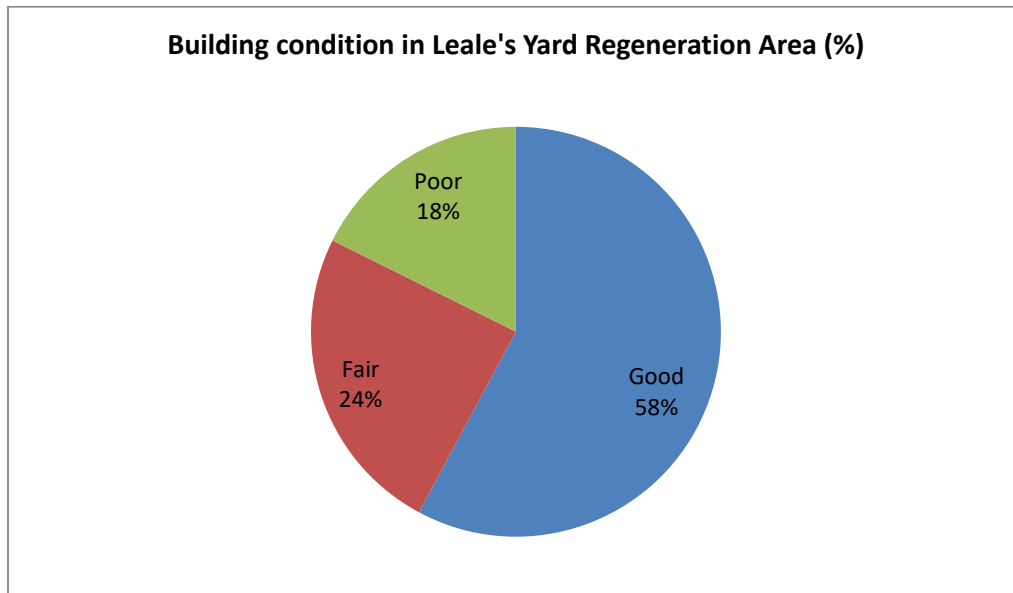


Figure 24: Building condition in Leale's Yard Regeneration Area (%)

The buildings in poor condition are predominantly those behind the main frontage of The Bridge, and constitute various former warehouses and other structures which are derelict or in a poor state of repair. The residential properties are generally in good condition, as were most of the buildings that also fall within the Core Retail Area. This is consistent with the findings in 2017.

Façade Activation

The façade activation ratings were assessed for part of the Bridge Core Retail Area, as previously described. The additional non-residential buildings included the vacant warehouses within the inner area of the Regeneration Area (which would rate poorly but were not assessed individually), the North Social Club (which was rated 5: Monument) and the Salvation Army Community Centre, which was also rated 5: Monument.

Summary

No significant changes were recorded during the survey of the Leale's Yard Regeneration Area. There has been no progress with redevelopment of the derelict part of the area so it remains much the same as in 2017 and 2018 saw the outline planning permission for 303 dwellings on the site lapse. Apart from this 'inner area' of the Regeneration Area, the buildings are generally well kept. The uses encompass the variety of the frontage of The Bridge as well as predominantly residential streets of Nocq Road and Lowlands Road.

Goad Categorisation of Uses in the 'Bridge town centre' Area

As with St Peter Port, in the 2017 retail survey the Goad categorisation system was applied to the Bridge Core Retail Area, but in order for the data to be comparable with town centres in other jurisdictions, has this year been applied to the main retail areas which extend beyond the Core Retail Area to include parts of the Regeneration Area and some of the Main Centre Inner Area.

Not all town centre uses are categorised, only those as shown in the [Table 2](#) below, which shows the percentage of units within the 'Bridge town centre' area within each Goad class.

Table 2: Goad categorisation of the main retail areas of the Bridge

Use	Goad Category	Percentage
Bakers	G1A	0.00
Butchers	G1B	1.39
Greengrocers & Fishmongers	G1C	0.00
Grocery, Frozen Food & Supermarkets	G1D	1.39
Off Licence and Home Brew	G1E	0.00
Newsagents, Confectioners & Tobacconists	G1F	2.78
Footwear, Cobblers	G2A	1.39
Men's & Boys wear	G2B	1.39
Women's , Girls and Children's Wear	G2C	2.78
Mixed and General Clothing	G2D	1.39
Furniture, Carpets & Textiles	G2E	5.56
Booksellers, arts/crafts, Stationers, Copy Bureaux	G2F	4.17
Electrical, Home Entertainment	G2G	2.78
DIY, Hardware, Household Goods	G2H	0.00
Gifts, China, Glass and Leather Goods	G2I	0.00
Motor Accessories, Car, Motorbike or Boat Sales	G2J	1.39
Pharmacy, Toiletries, Opticians	G2K	4.17
Department, Variety and Catalogue Stores	G2L	1.39
Florists	G2M	0.00
Sports, Toys, Cycles & Hobbies	G2N	6.94
Jewellers, Clocks & Repair	G2O	4.17
Charity Shops, Pets and Other	G2P	13.89
Hot food Takeaway, Sandwich Shops, Cafes, Restaurants	G3A	15.28
Hairdressers, Barbers, Beauty Salons	G3B	6.94
Dry Cleaners, Laundrette	G3C	1.39
Travel Agents	G3D	1.39
Banks, Accountancy, Financial Services	G3E	4.17
Building Societies	G3F	0.00
Auctioneers, Estate Agents	G3G	2.78
Post Office, Employment, Careers and information	G4A	0.00
Vacant	G4B	11.11
Total		100.00

[Table 2](#) above shows that there is a diverse range of retail uses within the Bridge main retail area, with 22 retail types represented out of 30 categories (excluding vacancies), compared with 27 categories represented within the main retail areas of Town.

'Hot Food Takeaway, Sandwich Shops, Cafes and Restaurants' have the highest representation overall (consistent with Town), and 'Charity Shops, Pets and Others' also

having significant representation on the Bridge (in contrast to Town). In terms of vacancies, the vacancy level in Town within the Goad area was 12.14%, compared to 11.11% at the Bridge.

The Bridge Main Centre: Overall Summary and Conclusions

The Bridge continues to offer a complementary shopping experience to Town. The retail offer is different and, at the time of survey, included bulky goods, such as from Homemaker (now closed), Scope and Regency Bedding in the Main Centre Inner Area. Similar to Town however, the spatial distribution of uses remains appropriate with retail clearly focused around a core area and the Harbour Action Area, as well as Leale's Yard Regeneration Area, will have a vital role to play in addressing conflict between vehicles and other users, and addressing the dominance of traffic around St Sampson's Harbour.

As before, listed on page 3 of this report are several factors which underpin vitality and viability. These are:

- Diversity of uses
- Footfall and accessibility
- Occupied versus vacant space
- Quality of buildings and space
- Popularity of the centre with those who live, work or visit there.

These are each considered briefly in turn to give an overall indication of the current vitality and viability of the Bridge.

Diversity of uses

Considering the size of the Bridge Main Centre, there is a diverse range of uses when looking at both the use survey and at the Goad categorisation. There is far less office provision in the Bridge main Centre compared with Town, but there is a significant amount of industrial, storage and distribution units. Overall the Bridge Main Centre appears to score reasonably well on the diversity of uses.

Footfall and accessibility

The Bridge is served by significantly fewer bus routes than Town (7 routes compared to 23 serving Town) and footfall counts do not tend to have the benefit of visiting cruise passengers or lunchtime office workers. There is cycle and pedestrian infrastructure in place to assist with access to the main shopping areas of the Bridge, as well as dedicated cycle routes to St Sampson High School. The topography of the Bridge Main Centre is such that the main shopping area is largely flat, though the Main Centre Outer Area is more varied and includes the hougue landscape. Overall, the Bridge Main Centre is reasonably accessible though footfall is much lower than in Town.

Occupied versus vacant space

There were three vacancies recorded in the Bridge Core Retail Area in 2017, and this has risen to 4 vacancies in 2018. The majority of premises are in active use. Outside of the retail area there were no new significant vacancies noted in the 2018 survey, although the former Quayside buildings remained vacant (and since the survey Co-Op Homemaker has

closed). Overall there are few vacancies in the Bridge Main Centre so this area can be scored reasonably highly.

Quality of buildings and space

Buildings within the Bridge Core Retail Area are of varying quality and interest, but taken individually there are several of high quality, such as the historic façade of Ray and Scott Jewellers and the scale and detailing of some of the retail units along The Bridge. The public realm in the Core Retail Area is limited and dominated by traffic and parking, but in the Bridge Main Centre Outer Area, Delancey Park forms a valuable and well used public open space and there is a contiguous swathe of Important Open Land running from the south of Delancey Park in the south of the Main Centre to Route de Braye in the north of the centre. It is reasonable to conclude that the Bridge Main Centre does not score as highly as Town in relation to the contribution of high quality buildings and space to vitality and viability.

Popularity of the centre with those who live, work or visit there

The Bridge boasts a strong sense of community and is well loved by many who live and work in the area. However it does not have the same appeal to visitors as Town, and is not generally perceived to be a tourist area. As other sources of information are published then these will be reviewed in future years, and the indications from the first Better Life Indicators Report to include Guernsey shows that as a whole, the Island is performing well.

Conclusion

The conclusions for the Bridge Main Centre remain largely unchanged since the 2017 report. There are clear opportunities for improvement and the Leale's Yard Regeneration Area and St Sampson Harbour Action Area offer potential to attract inward investment and to improve the public realm and reduce the dominance of traffic at the Bridge, as well as reducing conflict between the different road users. These areas also offer opportunities to increase the range of amenities, facilities, services and employment types to serve and support the, at present, dominant residential population and improve the sustainability of this Main Centre. Higher footfall counts on Saturdays appears to indicate the local community, who perhaps work elsewhere in the week, shop at the Bridge on weekends, with less reliance on office workers than in Town. Improvements to the public realm to encourage greater dwell time could capitalise on this.

Overall, whilst the Bridge is not always perceived as attractive as Town, the area has a high level of interest and there are clear opportunities to enhance the Bridge Main Centre to support its role. The strong sense of community in the area is also a great asset.

Overall Conclusions on the Main Centres

As in 2017, the main conclusion from the evidence presented is that both Main Centres appear to be in good condition, with many positive features and characteristics. There continues to be scope for significant public realm improvements in both Main Centres, particularly within the Core Retail Areas, Harbour Action Areas and Regeneration Areas. Whilst in 2017 the footfall counts appeared to indicate that workers in Town increase weekday footfall, in 2018 there were also high Saturday counts in Town. At the Bridge, consistent with 2017, the 2018 data indicated higher Saturday counts. This still suggests that weekday workers in the area have less of an impact on footfall than local residents at the weekends. Evening footfall counts were reasonably low in all areas and particularly the counts within the Bridge Main Centre, reflective of the limited evening and night-time economy of the area.

The quality of the individual buildings was generally high in both areas, although Town, in particular, due to the high level of planting, bunting and small historic shop units, is particularly attractive with a high level of detail in the shop fronts and individual units. The condition of buildings in both Main Centres is generally very high.

Both of the Main Centres would benefit from addressing conflict between road users, in particular the dominance of traffic and parking at the Harbours which reduces the potential of the links between the retail areas and the waterfronts. The SLUP, as well as the Vision for St Peter Port and the Bridge, places an emphasis on improving the quality of the public realm in both of the Main Centres as a means to enhancing vitality and viability. There are opportunities for pedestrianisation and the related potential to increase dwell time of shoppers in both Main Centres, but public realm improvements at the Bridge could be particularly significant as a mechanism to improve the vitality and viability of the Centre.

Whilst there are no new issues of particular concern raised in this report, monitoring over time will assist in identifying trends in the Main Centres, and any changes will be reported in subsequent years.

The 2018 research indicates that the Main Centres are performing as intended by the States in the SLUP, with both providing facilities and services in accordance with the hierarchical structure of the spatial strategy, with St Peter Port retained as the primary retail centre.

Appendix 1: Research Tools and Techniques

Research technique	Description	Policy relevance and purpose of research	Carried out in:			
			CRA	RA	MCIA	MCOA
Use survey	On-site survey noting building use and occupier, complemented by desk-based research (e.g. TRP records and planning history where appropriate). Vacancies also recorded.	<p>IDP supports Main Centres as vibrant mixed-use locations with retail (particularly comparison retail) focussed in the Core Retail Areas, supported by other uses particularly focussed in the Main Centre Inner Areas.</p> <p>Survey shows the balance of uses within the Main Centres by policy area, and allows observation of patterns and trends over time and by spatial distribution.</p>	Y	Y	Y	Y
Goad categorisation	Applying the Goad classification system (a recognised method of categorising different retail uses).	In monitoring the IDP for effectiveness, it is useful to have targets against which to measure. The Goad categorisation system will allow comparison of the retail offering with Town Centres in the UK and Jersey, to give some context and enable appropriate targets to be considered.	Y	Y	Where applicable	N
Building Condition survey	On-site assessment recording building condition (Good, Fair or Poor)	The IDP recognises the importance of the Main Centres as attractive urban areas. As a measure of viability, building condition can indicate whether there has been investment in buildings, with those assessed as poor potentially lacking investment. This assessment represents a snapshot in time and is subjective, although measures are taken to manage this subjectivity.	Y	Y	N	N
Opening hours	On-site and desk-based research to record opening hours of units.	<p>IDP supports extended opening hours by encouraging a wide range of retail, commercial & leisure activity that could take place after 5pm, enhancing vitality & viability through supporting the evening economy.</p> <p>Recording opening hours indicates whether there are clusters of evening activity and how these areas relate to the differing policy designations.</p>	Y	Y	N	N

Façade Activation	On-site survey assessing building facades for their interest, using a standard technique by Gehl Institute.	<p>The IDP places great emphasis on maintaining and enhancing vitality and viability in the Main Centres. Interesting building facades encourage people to slow down and offer visual stimulation, creating a reason to spend time on the street. This can encourage dwell time, supporting both vitality and viability.</p> <p>This assessment gives a broad indication of the quality of the facades in parts of the Core Retail Areas and Regeneration Areas, potentially highlighting areas for improvement that could enhance vitality and viability of the Main Centres.</p> <p>This assessment represents a snapshot in time and is subjective, although measures are taken to manage this subjectivity.</p>	Y	Y	N	N
Place Inventory	On-site survey recording the quality of public realm using a standard technique by Gehl Institute. Includes an inventory of physical features and an assessment of the experience of using the public space.	Both the SLUP and the IDP emphasise the importance of public realm, which in itself is important for the economy as well as the environment and socially, encouraging dwell time and adding to the vitality of the Main Centres.	Y	Y	N	N
Footfall counts	On-site recording using a consistent technique, using locations within the Core Retail Areas and Regeneration Areas.	Given the emphasis on vitality of the Main Centres, footfall is recorded as a measure of this vitality.	Y	Y	N	N
Stakeholder feedback	Feedback was requested from a variety of representative organisations to add a qualitative element to evidence.	Feedback from stakeholders has been embedded within the report to provide context and understanding to the quantitative data.	Generally, feedback was not specific to the policy designations and is reported where appropriate within this report.			
Plotting data in GIS (Geographical	Inputting data into a mapping system to plot uses, opening hours, building condition, Goad	Identifies the spatial distribution of non-residential uses, opening hours, building condition, Goad data, vacancies and other information as appropriate and allows spatial patterns to be identified.	Y	Y	Y	Y

Information System)	data, vacancies and other information.					
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Appendix 2: Façade Activation Ratings

1: Vibrant

- Small units with many doors
- High transparency
- No vacant or passive units
- Lots of character
- Good articulation, materials and details

2: Active

- Relatively small units
- Some transparency
- Few passive units
- Some articulation and details

3: Dull

- Large units with few doors
- Low transparency
- Some passive units
- Few or no details

4: Inactive

- Parking or vacant lot
- Large units with few doors
- Very little or no transparency
- Many passive units
- Uniform facades with no details or nothing to look at

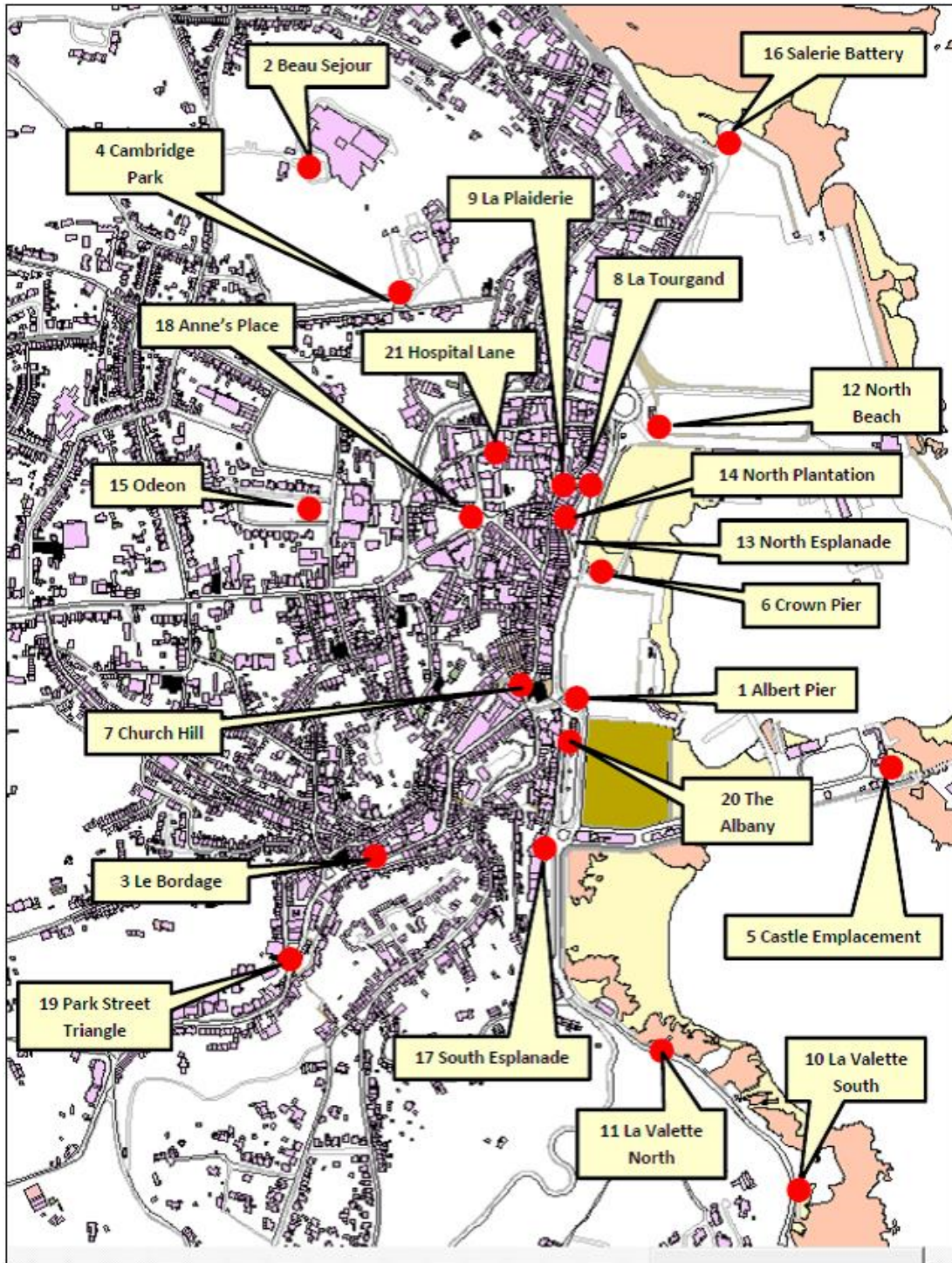
5: Monument

- A historic or artistic façade that may not be very active or transparent, but is visually remarkable

Appendix 3: Location of Cycle Stands

Table 1: Cycle parking in Town

Location (See Map)	Number of Stands	Approximate Capacity
1. Albert Pier	4	8
2. Beau Sejour Leisure Centre	4	8
3. Bordage	8 (4 covered)	16
4. Cambridge Park	5	13
5. Castle Emplacement	4	8
6. Crown Pier	18 (4 covered)	36
7. Church Hill	2	4
8. La Tourgand	9	18
9. La Plaiderie	3	6
10. La Valette South	3	6
11. La Valette North	6	6
12. North Beach	23 (20 covered)	46
13. North Esplanade	4	8
14. North Plantation	3	6
15. Odeon	12	24
16. Salerie Battery	4	8
17. South Esplanade	5	10
18. Anne's Place	10	20
19. Park Street Triangle	2	4
20. The Albany	2	4
21. Hospital Lane	5	10



Location of Cycle Stands in Town

Table 2: Cycle parking in the Bridge Main Centre

Location (See Map)	Number of Stands	Approximate Capacity
21. Bridge, Vale	5	10
22. Bridge, South Side	5	10
22a. Bridge, South Side (opposite Clock Tower)	5	10
23. Delancey Park North	4	8
24. Delancey Park (Pointues Rocques)	2	4



Location of cycle stands in the Bridge Main Centre

Contact Us for further information and advice at: Planning Service, Sir Charles Frossard House, St Peter Port. GY1 1FH Telephone 01481 717200 Email planning@gov.gg

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