

# SEAFRONT ENHANCEMENT AREA STAKEHOLDER WORKSHOP FEEDBACK REPORT

## Introduction

The Seafront Enhancement Area (SEA) programme is one of the States of Guernsey's 22 policy priorities. Led by the SEA Steering Group, the SEA programme looks to coordinate the States of Guernsey's approach to the enhancement of Guernsey's east coast.

Following the approval of its vision, enhancement principles and enhancement objectives (attached in Appendix ii), which established the direction of the SEA programme, as well as the broad criteria any enhancement must adhere to and set the high-level desired outcomes of the SEA programme respectively, the next steps for the SEA programme was to identify the types of enhancement that would enable these objectives to be achieved.

In February 2019, the SEA Steering Group held a two day workshop with the aim of hearing from stakeholders as to what they believed the priorities of the SEA programme should be. Stakeholders were asked to provide a written submission<sup>1</sup> outlining what they believed the challenges and opportunities associated with the SEA programme were, and were also invited to present their thoughts to the Steering Group.

Across the two-day workshop, 23 different stakeholder groups (attached in Appendix iii), covering a wide range of issues relevant to the SEA programme, provided written submissions and presented to the Steering Group. Summary notes of each of these presentations have been included in Appendix i. The presentations highlighted a number of areas where stakeholders' views were aligned with regards to what they believed the priorities of the SEA programme should be. Using these views, the Steering Group developed a number of statements of intent, outlining developments that the Steering Group want to investigate for inclusion in a plan for the enhancement of the east coast. These statements of intent are:

- a. Enhance the contribution of Guernsey's retail sector, through development that encourages greater footfall in the main centre inner areas along Guernsey's east coast.**

Much of the space afforded to retail in Guernsey is located along the east coast. Stakeholders suggested that the SEA programme represented a significant opportunity for this sector to be supported through development.

- b. Provide infrastructure that enables both the effective operation of, and maximises the effective operation of, and maximises the socio-economic contribution of, the Harbours.**

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<sup>1</sup> Written submissions were based around the following questions:

1. What are the challenges facing Guernsey's east coast?
2. What are the opportunities, afforded by seafront enhancement, available to Guernsey's east coast?
3. Are there any factors that support Guernsey's east coast which need to be protected?
4. Are there any other points that you believe the Steering Group should take into account?

Stakeholders suggested that there were several significant issues facing the Harbours along Guernsey's east coast, including ageing infrastructure and increasing conflicts of use, both land and water-side. Stakeholders suggested that, in providing infrastructure to resolve these issues, there were also opportunities to increase social, economic and environmental benefit.

- c. Enhance the economic contribution of Guernsey's tourist industry through development that focuses on (a) recreational activities, including enhancing Guernsey's culture and leisure offering, (b) providing suitable visitor accommodation, and (c) improving existing transport infrastructure.**

Stakeholders suggested that Guernsey's east coast, especially St Peter Port, is one of Guernsey's most significant tourist attractions, and the SEA programme provides many opportunities for Guernsey's tourist product to be enhanced.

- d. Enhance the contribution of Guernsey's arts sector, through the provision of facilities that enable the creation and display of both local and international arts.**

Providing infrastructure to support the creation and display of arts has potentially significant socio-economic benefits, and stakeholders suggested that there is interest from both the public and from industry in having greater emphasis on the arts in Guernsey.

- e. Support Guernsey's fishing industry through development that provides suitable infrastructure to enable the effective operation of the industry.**

Fishing is one of Guernsey's most traditional industries, it is an integral part of Guernsey's heritage and supports Guernsey's tourist product by enhancing St Peter Port's environment as a traditional harbour-side town. Stakeholders suggested that the existing infrastructure and facilities that support the fishing industry were poor, and that this was having a negative impact on the industry.

- f. Investigate the potential for Guernsey to become a premier destination for the berthing of superyachts.**

Stakeholders suggested that there was a potentially significant market that Guernsey is overlooking by not having adequate facilities for the berthing of superyachts. The current provision, using commercial berths to moor superyachts, has led to vessels cancelling trips to Guernsey due to damage sustained by insufficient fendering. There appears to be a growing market worldwide for superyachts and, given factors such as Guernsey's location and comparatively low fuel costs, the provision of purpose build superyacht infrastructure and facilities could see Guernsey become an attractive destination for these vessels.

- g. Support Guernsey's cruise industry through development that (a) improves the ease of transferring passengers to and from ships, and (b) enhances the cultural and recreational offer of Guernsey's east coast for cruise passengers.**

The cruise industry is estimated to directly contribute £4 million per annum to Guernsey, and also accounts for wider benefit, as 3% of overnight stay visitors to Guernsey had previously visited the Island by cruise. Whilst the cruise industry is of significant value to Guernsey, stakeholders suggested that Guernsey's offering could be improved to maximise the benefit received from this industry.

**h. Investigate the need for development to meet demand for business premises and housing.**

Guernsey's east coast, specifically St Peter Port, contains Guernsey's main socio-economic hub. Stakeholders suggested that there is a shortage of appropriate office space in Guernsey, and that the SEA programme represented a significant opportunity to undertake development that provides suitable infrastructure to meet demand for both business premises and housing.

**i. Undertake development that increases the environmental contribution of Guernsey's east coast.**

Stakeholders suggested that there were many areas along Guernsey's east coast that were relatively poor in terms of their contribution to Guernsey's biodiversity and ecology, and that, in this sense, the SEA programme provides an opportunity for the environmental contribution of the east coast to be enhanced through the development of purpose designed green space.

**j. Maximise opportunities for the provision of open space along Guernsey's east coast.**

Stakeholders advised that there was significant demand for improved public spaces in Guernsey, and that the SEA programme represented an opportunity for such open space to be provided.

**k. Support Guernsey's leisure boat industry through developments that provide suitable infrastructure and facilities that will benefit both local and visiting yachtsmen.**

Guernsey's leisure boat market is being restricted by a lack of suitable berths, and by relatively poor facilities for leisure boats in comparison with competitor jurisdictions. Stakeholders suggested that, globally, this market is growing and that Guernsey is missing out on a significant economic value from local and visiting vessels due to the lack of suitable infrastructure and facilities.

**l. Undertake development that increases the connection between people and place.**

Stakeholders highlighted the importance of ensuring that the public has an involvement in, and a sense of ownership of, the development arising as a result of the SEA programme. Ensuring that development enhances the connections between people and place is key to the success of the SEA programme.

- m. Address the impact of parking in St Peter Port by relocating the parking away from the surface of the piers, without reducing (a) the number of spaces in the St Peter Port main centre inner area, and (b) the ease of access into the St Peter Port main centre inner area.**

A combination of traffic flow through what is an arterial route along Guernsey's east coast and the volume of land afforded to parking along the seafront has caused Guernsey's east coast, especially St Peter Port and St Sampson's, to become dominated by the motor vehicle. Whilst dominance of the motor vehicle along the east coast detracts from Guernsey's tourist product, and also impacts St Peter Port and St Sampson's as social hubs, it is necessary to understand the importance of vehicle access to the viability of a town centre. Stakeholders highlighted the importance of addressing the negative impact of the motor vehicle along the east coast, without reducing access to these areas.

- n. Evaluate movement along the seafront with the aim of creating an appropriate balance of pedestrian and motor vehicle activity in this area.**

A combination of traffic flow through what is an arterial route along Guernsey's east coast and the volume of land afforded to parking along the seafront has caused Guernsey's east coast, especially St Peter Port and St Sampson's, to become dominated by the motor vehicle. Whilst dominance of the motor vehicle along the east coast detracts from Guernsey's tourist product, and also impacts St Peter Port and St Sampson's as social hubs, it is necessary to understand the importance of vehicle access to the viability of a town centre. Stakeholders highlighted the importance of addressing the negative impact of the motor vehicle along the east coast, without reducing access to these areas.

- o. Provide infrastructure that protects Guernsey's east coast from predicted sea level rise over the next century.**

Several areas of Guernsey's east coast are currently affected by sea overtopping during certain tides. Predictions for sea level rise of around 90cm by 2100, combined with increased frequency of storm events mean that this overtopping is likely to worsen. Stakeholders suggested that the SEA programme should consider the opportunities for additional/improved sea defences to be incorporated within other developments arising from the SEA programme.

- p. Investigate the potential for Guernsey to increase its production of marine based renewable energy.**

Factors such as Guernsey's large tidal range mean that renewable energies, such as tidal energy, have the potential to be very effective in Guernsey. Stakeholders suggested that the nature and scale of the SEA programme means that there is an opportunity to investigate whether these technologies can be incorporated into development.

- q. Improve the accessibility of the main centre inner areas along Guernsey's east coast.**

As the long established main socio-economic hub in Guernsey, St Peter Port presents several issues for people with disabilities, partly due to its topography, but also it's built environment which pre-dates modern societal attitudes and build techniques. These include uneven cobbled surfaces, poor lighting and prevalence of steps. Stakeholders also highlighted that, due to Guernsey's ageing population, the number of individuals living with disabilities is likely to increase, which will exacerbate the negative impact of the inaccessibility of some areas of St Peter Port.

### **Next Steps**

The Steering Group will now be undertaking research to understand the extent of the options afforded to the SEA programme by each of the statements of intent. In many cases, this research will involve further engagement with key stakeholders and with the general public to gather understanding about the issues and opportunities facing Guernsey's east coast.

## Appendix i

### Stakeholder Presentation Summaries

#### Local Issues

Representatives identified three areas of priority regarding the SEA programme;

**1. Guernsey's character and environment.** Any development would need to be in keeping with St Peter Port's current culture and design. Whilst certain areas along the seafront, such as La Vallette, did not require significant change, there were other issues that needed solving. The flow of traffic along the seafront was identified as a particular issue for St Peter Port, as the dominance of the motor vehicle along the quay had caused a significant disjoint between the town and seafront. Representatives advised that the balance of priority between the motor vehicle and pedestrian in this area should be evaluated.

**2. The impact of climate change and sea level rise.** With an expected 100cm rise in sea levels by 2100, and with areas along Guernsey's east coast already at risk of flooding at certain tides, a priority of the SEA programme should be to investigate the mitigation of future flood risk.

**3. Guernsey's economic future.** The harbour and marina was identified as the 'jewel in St Peter Port's crown', and representatives saw the marina as an area which had opportunity for enhancement to result in significant economic growth. In comparison with marinas in nearby jurisdictions, the facilities in St Peter Port's marina were severely lacking, and could be improved in order to attract visiting yachts.

St Sampsons has been identified as an area where the design of public space could be improved. Currently the various styles of street furniture are detracting from the natural beauty of this area. The SEA programme provides significant opportunities for the enhancement of the Bridge, including the development of housing, which would help breathe new life into the area. There were also opportunities to review traffic flows in the area and the development of pedestrianised space, which could then allow for activities such as al-fresco dining along the waterfront.

#### Environment

Representatives suggested that there were several areas within St Peter Port and along Guernsey's east coast that could be enhanced in order to improve environmental benefit. Any development would have some level of impact on the natural environment, and although the exact conditions would not be able to be replicated elsewhere, the SEA programme should consider how development can offset and mitigate against the loss of natural environment.

Green space in St Peter Port is important and should be protected. Where possible, the development of new green space should be encouraged but the SEA programme will need to consider the implications of the ongoing maintenance of these areas.

Areas such as La Vallette and Belgreve Bay are of significant importance for Guernsey's biodiversity and as such, any development of the latter should not impact the intertidal nature of the bay or its associated wildlife.

### Fishing Industry

The Fisherman's Quay is in very poor condition and the lack of suitable facilities, such as additional storage facilities and a quayside crane, in this area are having a negative impact on the fishing industry. Even in other jurisdictions with little or no tidal range, quayside cranes are common. The additional difficulty for Guernsey's fishermen unloading their catch in low water spring tides is considerable.

One solution to this issue could be to relocate the Fisherman's Quay. If St Peter Port harbour was extended to the east of the QEII Marina then a purpose built space to support the fishing industry could be incorporated into this development. The space vacated by the fishing industry could be enhanced and used for new harbour activities, such as the berthing of superyachts.

Furthermore, the extension of the harbour to the east of the QEII Marina would mitigate against future risks of the current harbour infrastructure becoming inadequate to support modern ship sizes. Commercial ships are becoming larger, and if trends continue then the current St Peter Port harbour facilities will not be able to accommodate these ships.

### Marine Trades

Geographically, Guernsey is in a very strong position to take advantage of the volumes of passing boats.

#### **Visiting leisure boats**

In recent years Guernsey has seen a significant reduction in visiting boat numbers due to new marinas and superior facilities in Jersey, Normandy and Brittany. The facilities in Guernsey are dated and basic. The toilet/shower block on the Crown Pier of four toilets and four showers is inadequate for up to 275 boats/700 crew moored on the Crown or on the Swan pontoons. Facilities on the Albert Pier are out of date and a 1/3 mile walk away for most of the visitor boats which are moored on the Crown Pier.

Visiting leisure boats are getting bigger and Guernsey's facilities for larger and deeper draft boats are very limited. Representatives advised that Guernsey needs to look into improving the quality and increasing the number of berths for these vessels.

#### **Local resident moorings**

Representatives advised that Guernsey is at capacity for local moorings, and that in the short term there is a need to run the marinas more efficiently and maximise their use. There is also a shortage of berths for large local boats.

There is a need to plan significant new marina berths and facilities for the near future, for new local moorings, for larger berths and some deeper draft boats.

One solution could be to offer berths not taken up by Island residents to non-locals on short term contracts for overwintering or one to five year contracts.

The immediate options for development are the St Peter Port Pool, the Careening Hard, No's 8 and 9 berths to the Crown and the area by the Fish Quay. The development of a Pool Marina and new facilities for locals and visitors would provide shelter for the Victoria Marina and to allow for overwintering of visiting boats.

Guernsey needs to upgrade and develop its leisure boat facilities for local berth holders and for visitors alike to retain the trade and the leisure opportunities for both sectors.

### Freight

Representatives highlighted a number of issues with the St Peter Port harbour. These included a lack of space available land-side for the multiple commercial aspects of the port, as well as a port that was becoming inadequate to provide for the generally increasing size of commercial vessels.

At an operational level, there are a number of inefficiencies arising from having the majority of freight operators' depot at Bulwer Avenue. If the freight depot could be brought closer to the harbour this would result in fewer HGV movements along the seafront and would in turn reduce congestion in this area.

One opportunity to solve this issue would be to extend the St Peter Port harbour to the east of the QEII Marina. Reclaiming this land would allow for the creation of a fit for purpose port, which would alleviate the risks associated with larger ships not being able to access St Peter Port harbour, and would also create sufficient operational space for the commercial aspects of the port.

However, representatives advised that Guernsey was somewhat limited by the size of Jersey's port, as the majority of commercial vessels would need to access both ports.

### Freight and Passenger Movement – Large

Representatives advised that the functionality of St Peter Port harbour is a key challenge for many commercial port users. There are frustrations about the standard of the facilities and infrastructure of the harbour, and there is increasing levels of conflict for a restricted amount of space around the harbour.

Significant issues include the condition of the harbour terminal, which is, in many cases, visitors' first impression of Guernsey and is in severe need of improvement. Development of an improved passenger terminal would not only improve visitor's perception of the Island, but would also provide opportunities to provide retail opportunities in the terminal.

The current amount of space within the St Peter Port harbour restricted zone is an everyday issue. There is an ever increasing demand for space in the restricted zone and this lack of

space can potentially affect the choices afforded to business and industry with regards to how to operate. The potential extension to the east of the QEII Marina would provide additional space to allow businesses to develop and could also provide the ability to re-format the area to become more user friendly and safer.

There are also operational difficulties with the harbour, as four or five times a year vessels cannot access St Peter Port harbour due to tidal restrictions.

With ageing vessels and legislation steering towards vessels not being allowed to sit on the harbour bottom in a drying out state, the trend may well move towards more product being shipped on ro-ro or containerised units into St Peter Port, providing the opportunity to redevelop St Sampsons.

#### Freight and Passenger Movement – Small

Representatives suggested that there are significant and increasing conflicts between the various commercial operators using the St Peter Port harbour over the limited amount of space in the secure zone of the harbour and around the main passenger and freight operating area. These issues could be resolved by creating some form of 'marine leisure centre' in St Peter Port, which would include facilities for travel to Herm and Sark and also facilities for recreational marine-based activities.

The other issue surrounding the lack of space for users of the port and also impacting on the customer/user experience is that it conflates both leisure and commercial harbour activities. In order to fully maximise Guernsey's tourism product, there is a need to separate the commercial and leisure activities on the harbours.

#### Leisure Port Users

The marine leisure industry is currently worth an estimated £20 million to Guernsey's economy, and has the potential for significant growth. However, there are many factors restricting the potential growth in this market, including:

- 1. Access to berths.** In order to encourage people to use their boats, there needs to be adequate and suitable provision of parking in close proximity to the harbour. Currently, access to parking is restricting people's ability to use their boats as they either cannot access a parking space within a suitable distance to their berth, or cannot access a parking space that allows enough time to use their boat. Any developments arising from the SEA programme should not further restrict parking and access to leisure boat moorings.
- 2. Number of berths.** The number of berths for larger vessels are limited and this is restricting potential new boatowners from entering this market. The configuration of the marinas need to reflect the change in demand with boats generally getting larger.
- 3. Tidal restrictions.** In many cases the harbour infrastructure is not adequate to allow access to the sea at all times, and so potential boatowners are being restricted by the sea not being accessible via St Peter Port harbour at certain tides. Development of the St Peter Port harbour pool could create a larger floating marina with 24 hour access for local and visiting vessels.

**4. Access to boat lay-ups.** Space for boat lay-ups is very important for boatowners. There is currently insufficient amount of space made available for boatowners to maintain their vessels outside of the water.

**5. Poor marina facilities.** The facilities for both local and visiting boatowners are severely lacking, especially when compared to the facilities in marinas of competitor jurisdictions. In order to attract visiting, and encourage local, boatowners, it is integral that the marina facilities are at least brought up to a similar standard to competitor marinas.

**6. Inadequate harbour infrastructure.** Generally, leisure boats are getting larger and the infrastructure of St Peter Port and St Sampsons harbours is becoming less and less able to accommodate these larger vessels.

Representatives advised that it was important that existing facilities, such as the Havelet slip, are maintained.

One solution to some of the issues faced would be to extend the St Peter Port harbour to the east of the QEII Marina. This would create a dedicated area for handling of freight and passenger traffic, as well as enabling the pool area to be reorganised into a large floating marina for both visiting and local moorings with deeper water for larger vessels and 24 hour walk-ashore access. This development would provide additional protection to, and create conditions within the Victoria Marina so that it is suitable to provide overwintering. Currently, the Victoria Marina is an extremely underutilised asset during the winter, and through some comparably minor enhancements it could provide significant economic benefit.

Representatives advised that the St Sampsons harbour would not be the best location for the development of an improved leisure marina due to the impact of other activities in this area, such as that of the power station. Furthermore, the tidal restrictions association with St Sampsons harbour mean that this harbour is wholly unsuitable for yachts.

### Leisure Boats

Representatives suggested that there are significant opportunities to attract visiting boats that Guernsey is currently missing out on. As a result of its comparatively poor marina facilities and infrastructure, Guernsey's overseas reputation as a leisure marina destination is very poor. Not only is the marina offering impacting on potential new visiting boats, it is also having a more tangible negative impact in the form of regattas deciding not to return to Guernsey and to instead go to Jersey.

St Peter Port harbour's poor offering is also having a negative impact on emerging industries, such as the berthing of superyachts. Within the last year, a significant superyacht visited Guernsey twice, and was scheduled for a third visit, before deciding not to return due to damage sustained to the vessel as a result of harbour facilities. The potential benefit of providing facilities for superyachts in Guernsey is significant, and globally the market of large vessels and superyachts is growing. St Peter Port harbour's provision for larger vessels is severely lacking, and this is restricting Guernsey's ability to achieve the potential benefits arising from berthing large vessels and superyachts.

If the benefit arising from visiting boats is to be fully achieved, then St Peter Port harbour should become an entirely leisure boat marina, which would require the relocation of the commercial aspects of the harbour. In doing so, this would make available significant proportions of land and harbour infrastructure for development into improved facilities for superyachts.

One underutilised area of the St Peter Port harbour is the deep-water pool on the outside of the Victoria Marina. There is an opportunity to develop a new marina in this area, which would alleviate some of the issues surrounding the shortage of supply of berths, lack in suitably sized berths, and provision of adequate on-shore facilities. The provision of such improved infrastructure and facilities would start to enhance Guernsey's reputation as an attractive marine leisure location.

### Cruise Industry

Representatives highlighted the need to improve the quality of cruise liner facilities in St Peter Port as this is considered a key factor which will help in maximizing of benefit arising from the cruise industry. Currently, cruise ships have to tender their passengers to and from the ship due to a lack of alongside berthing in Guernsey. Not only does the requirement to tender mean that certain cruise liners will not visit Guernsey, it also is a significant detractor from Guernsey's offering to the cruise industry due to the increasing risk of weather related cancellations. During 2019, 78 ships successfully brought passengers ashore, however 25 ships had to cancel their visit due to adverse weather conditions. Issues such as long waiting times and lack of cover during hot and wet and windy weather conditions can have a negative impact on the cruise visitor experience.

Since 2008, the annual number of cruise ships visiting Guernsey has significantly increased, from 45 ships to 78 ships in 2019. Likewise, the number of passengers visiting Guernsey has also increased, most recently being 115,000 passengers in 2019. Not only does the cruise industry have a direct benefit of approaching £4 million yearly contribution to Guernsey's economy, it is also resulting in wider indirect benefit, with 3% of overnight stay visitors to Guernsey having previously visited the Island on a cruise ship.

Although Guernsey is frequently considered to be one of the favourite UK ports for cruise liners, receiving the Cruise Critic award for 'Best UK Port of Call' for three consecutive years (2016 – 2018), other jurisdictions are improving their offering for cruise liners, which, coupled with the need to improve the quality of facilities in St Peter Port, is reducing Guernsey's competitive position and ability to attract increased numbers of cruise liners to visit the Island.

In order to maintain its competitive position, Guernsey will need to enhance its facilities for cruise liner passengers and should consider providing improved infrastructure that would remove the need for cruise liners to tender their passengers to and from the ship.

### Business

One of the most significant challenges faced by Guernsey over the next century is the impact of sea level rise, and with conservative projections suggesting a 100cm rise by 2100 Guernsey's east coast would be significantly impacted. Areas along Guernsey's east coast are already susceptible to flooding at certain times of year, and, without any investment to mitigate these threats, it will become increasingly difficult to attract private investment in these areas.

A fundamental pillar for the success of Guernsey's tourism product is St Peter Port's environment as a unique harbour side town. However, the dominance of the motor vehicle in St Peter Port is adversely impacting the visual amenities of the town and as such is severely detracting from its attractiveness as a desirable tourist destination. Surface car parking in prominent areas of St Peter Port is unattractive and a poor use of what is otherwise prime real estate. Furthermore, the use of the seafront quays as arterial traffic routes, and the subsequent congestion, is further divorcing the town and harbour.

Although parking may not be in the ideal location, the provision of adequate and suitable parking is integral to the survival of St Peter Port town. Ease of access to St Peter Port is vital to Guernsey's retail and finance sectors, and any developments should not reduce this.

#### Private Sector Involvement

Guernsey's east coast represents a significant untapped asset, and the SEA programme should look to encourage the private sector to become involved wherever possible. Whilst the States of Guernsey should set the framework and direction for development, and should remain the landowner of the developed land, it is the place of the private sector to undertake the physical development. The private sector are best placed, both in terms of availability of capital and high risk appetite, to see the potential of Guernsey's east coast realised.

Representatives highlighted that in order to attract the private sector to invest in SEA programme developments, there needs to be some form of commercial incentive involved in the development, and that, in this sense, larger developments would be more attractive than smaller developments in order to achieve economies.

#### Vehicular Access

The importance of the car should not be understated. A supporting factor for many of the businesses based in St Peter Port is the ease of access and convenience of parking. If this convenience were lost, it would likely have a negative impact on the socio-economic viability of St Peter Port.

The current provision of parking in St Peter Port is not optimal, as much of the prime real estate along the harbour is afforded to parking. Although there may be a need to rethink the location of parking, this should not come at a cost of reducing the convenience offered by the current parking provision. In order to ensure the survival and to encourage the success of St Peter Port town the SEA programme needs to make sure people remain able to easily access town.

Relocating parking to the outskirts of town, along with some form of public transport service to shuttle people into the centre of town could be a possible solution. If done correctly this option would not significantly reduce convenience and access of town but would remove parking from piers.

In Guernsey there is an ongoing trend of increasing car ownership and this is predicted to continue. However, representatives highlighted that there has been, and is expected to be further, change in the types of vehicle owned, as there has been a shift towards electric vehicles. This shift is likely to be further supported, over the next decade, by external factors such as major jurisdictions setting dates for the banning of internal combustion engines. Guernsey's current infrastructure would not be sufficient to support this increase in electric vehicles.

### Planning

Identified in the Island Development Plan, the Harbour Action Areas (HAA) provide, for the first time, robust delivery mechanisms for the comprehensive redevelopment of Guernsey's harbours and seafront. The principal aim of the HAAs is to make the most of two of the Island's strongest assets, providing for the safe functioning of the commercial ports to modern standards whilst drawing in economic contributions to secure improved infrastructure, commercial, leisure and recreational opportunities, enhancing the environment and reducing negative impacts of traffic.

Representatives highlighted that the historic context to the HAAs was of particular importance, being within a Conservation Area and containing a large number of Protected Buildings.

### Population Trends

The central population projection suggests that, overall, Guernsey's population will remain constant over the next 50 years given the current levels of net migration. However, Guernsey is facing both an ageing demographic, with significant increases in the levels of individuals above State pension age and aged over 85 forecasted, and a reduction in the working age population. The combination of an ageing demographic and reduction in working age population will result in a significant increase in dependency ratios.

Inward migration of at least 200 people per annum would be required to maintain the working age population at its current size and provide some mitigation of the projected increase in the dependency ratio. In order to attract these individuals to Guernsey, there is a need to ensure Guernsey is an attractive place to live and work, and the SEA programme is an opportunity to make Guernsey's east coast a nice place to live and work. Factors such as adequate and suitable provision of housing, office accommodation that is attractive to business, leisure activities and public amenities all contribute to Guernsey as a place to live and work.

### High-Net-Worth Individuals

Guernsey is a very attractive place for HNIWs (high-net-worth individuals), who, in many cases, are able to live anywhere in the world. This means that Guernsey is in direct competition with other jurisdictions to provide the best environment in order to retain existing and attract new HNWIs to the island. For many, Guernsey's convenience and ease of life is a significant factor in the decision to relocate to the island and this should be protected and enhanced where possible.

The aesthetic and traditional features of St Peter Port are extremely important as, visually, Guernsey's east coast is very striking and is frequently used in materials to attract HNWIs to the island.

Improvements to marina facilities would support Guernsey's ability to attract HNWIs to the island, which would include improving access to marinas, more and larger berths, and some parking spaces to cater for larger vehicles. Appropriate parking is important as many individuals with larger vehicles on island can be put off from parking in St Peter Port, where all spaces are standard or small, meaning a risk of damage.

### Traffic

Representatives advised that the current States policy on parking was neutral, and so there was no aim to increase or decrease the number of parking spaces in St Peter Port town. However, it was noted that the location of parking was of concern, especially the parking on the piers in St Peter Port. Not only does parking in these areas cause greater vehicle movements along the Quay, it also detracts from St Peter Port aesthetically.

One potential solution to this issue would be to relocate and consolidate parking away from the piers by providing several multi-storey car parks on the outskirts of town. Although there are no obvious locations for such car parks at this time, it could be investigated to see how viable this solution would be. There could also be an option to provide some form of shuttle transport from the parking on the outskirts of Town to the centre of Town.

The SEA programme provides a significant opportunity for the improvement of the public realm and to investigate areas for pedestrianisation in order to redefine the priority in St Peter Port away from motor vehicles and towards pedestrians. Currently the motor vehicle dominates St Peter Port and the wider east coast and the number of vehicle movements across the Quay increases the physical barrier between the town and harbour. Further vehicle movements along the east coast would be reduced if the harbour and freight depot could be brought closer together.

In the longer-term there may be merit in investigating whether the bus terminus could be relocated. Currently it works well but does take up a large area of land along the seafront which may have a more effective use.

### Disabilities/Accessibility

The 2012 Guernsey Needs Survey identified that around one in five islanders are living with a disability which substantially affects their everyday life, and that there are an estimated

4,000 unpaid carers on island. The prevalence of both the number of individuals living with disabilities and unpaid carers is likely to increase as a result of Guernsey's ageing demographic.

The value of Guernsey's purple pound<sup>2</sup>, which is derived from that of the UK's, is estimated to be worth £250,000,000 to Guernsey's economy. As St Peter Port is Guernsey's socio-economic hub, it is important to ensure that accessibility considerations are taken into account when considering the redevelopment of Guernsey's east coast in order to achieve the potential benefit arising from enabling people with disabilities to participate more.

Its hilly landscape means that St Peter Port has natural limitations with regards to accessibility. However, factors such as uneven surfaces, inadequate lighting, prevalence of steps and limited appropriate and nearby parking mean that St Peter Port further discourages people with disabilities from participating.

The provision of toilet facilities, including changing places facilities, are an important consideration when encouraging people with disabilities to access Guernsey's east coast, and the current limited facilities further discourages people from visiting these areas. Improvements could also be made to the harbour facilities, as the extreme rise and fall of the tide mean that there can be accessibility issues when embarking/disembarking vessels in the St Peter Port harbour.

## Energy

Representatives advised that the way in which Guernsey imports its hydrocarbons is changing significantly. Through a combination of improved efficiency of fuels, a reduction in demand for fuels, and a transition from hydrocarbons towards electric goods the need for Guernsey to import hydrocarbons is reducing. Externally, changes to global macro policy are likely to further influence the reduction in hydrocarbon use, as jurisdictions are setting emissions reduction targets as well as, in some cases, dates for the banning of sale of internal combustion engine vehicles.

Guernsey's hydrocarbons are imported via St Sampsons harbour, which, due to tidal restrictions, requires NAABSA (not always afloat but safely aground) vessels. The requirement to use these vessels causes concern for the security of hydrocarbon supply, as, globally, NAABSA vessels are becoming more and more uncommon. The tidal range at St Sampsons harbour also restricts the time that vessels are able to offload hydrocarbons, which is a risk to the hydrocarbon supply of the island in the case of rough seas or ships being behind schedule.

One alternate to bulk importation of hydrocarbons using NAABSA's is to import hydrocarbons using ISO tanks, which can operate via the Ro-Ro ramps at St Peter Port harbour so are not as impacted by tidal restrictions, and would require less specialist infrastructure in the form of NAABSA's.

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<sup>2</sup> The Purple Pound is the spending power of people with disabilities.

Representatives highlighted that overall hydrocarbon demand would still be likely to be reducing even if Guernsey were to offer refuelling for large yachts or even superyachts. It is predicted that the only service Guernsey could offer which would reverse the trend of reducing hydrocarbon demand would be providing refuelling to cruise liners.

### Inert Waste

The Inert Waste Strategy is the overarching, sustainable approach to managing all forms of inert waste<sup>3</sup>. The requirement for a new site for recovery or disposal of inert waste arises because the current inert waste facility – a land reclamation site at Longue Hougue – will be full by around 2022 and will require a replacement solution.

In determining this replacement solution, an evaluation of 50 different potential locations for an inert waste site was undertaken. The outcome was the identification of Longue Hougue South as the preferred option due to its 15 year capacity, reasonable cost recovery and creation of land for potential further benefit. The land could be used afterwards for development which may be identified prior to the site becoming full (at around 2039) – such as industrial, residential, infrastructural for renewable or space for marine or port operational use, for example.

A potential site to the east of the QEII Marina was evaluated, but was considered to be an inferior option solely as an inert waste facility. Proposals around the St Peter Port harbour have a greater number of challenges from an environmental and economic perspective when compared to Longue Hougue South.

The outcomes of the Best Practical Options process and the leading options that identified, were presented at a workshop on 27<sup>th</sup> July 2017, attended by members of the Committee *for the Environment & Infrastructure* and the States' Trading Supervisory Board. A new inert waste site east of the QEII Marina was included as one of seven potential solutions, and considered alongside other leading options. The feedback at that workshop identified a land reclamation project in St Peter Port might have merit. However, it also identified there were potential drawbacks, notably conflict between the requirements of an inert waste site (i.e. longevity) and the likely greater urgency in development of strategically important new infrastructure – particularly given the location – therefore it is not suited as an inert waste disposal facility.

The (ID) requirement for a Harbour Action Area local planning brief would also likely preclude development to meet the required timescales for a new inert waste site. However, importantly, it was also noted that harbour development was being considered as part of the wider Seafront Enhancement Area programme, and it was concluded that a separate initiative would identify the requirements for any such development. The QEII Marina was therefore not included in the final shortlist presented in the December 2017 policy letter.

### Tourism

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<sup>3</sup> Inert Waste is waste which does not react with the surrounding environment and typically is waste from the building and demolition industry such as concrete, brick, tarmac, ceramics, stone and soil.

St Peter Port is considered to be Guernsey's "Jewel in the Crown", and is consistently quoted as one of Europe's most attractive harbour towns. However, many stakeholders in Guernsey's tourist industry believe that St Peter Port as a tourist attraction is under optimised and does not meet its potential. The PWC Strategic Review of Guernsey's Tourism Product Offering report, published in 2018, also identified this and also specifically identified the Castle Cornet visitor attraction and the Victor Hugo offering as areas that are currently underexploited and, as such, development to allow for appropriate commercialisation would make their offering more relevant and appealing to today's visitor market and would help ensure long-term viability and financial sustainability.

Visitors' feedback through VisitGuernsey's regular surveys ranks the island's natural beauty, leisure walking, heritage, island hopping and eating out as the main contributing factors for visiting Guernsey. St Peter Port however, delivers well below expectations when it comes to providing opportunities for entertainment or to eat and drink inside or al-fresco in close quarters to the harbour.

Island hopping is a key differentiator for Guernsey and a major attractor to the Island. However, the lack of available long term parking and modern terminal facilities is seen as a deterrent for those who wish to visit Herm, Sark and Alderney by sea.

Visiting yachts are a tourist demographic that Guernsey could do significantly more to attract. Currently, the facilities offered to this market at the St Peter Port marina fall well below that offered by competing UK and French marinas. Improvement of these facilities will illustrate Guernsey's desire to attract the larger, higher spending yachts and motor cruises to the Island.

The current domination of the motor vehicle along the St Peter Port seafront is a significant detractor from the appeal of St Peter Port as a tourist destination. As such, relocating car parking and traffic flows away from the waterfront in order to allow the development of accommodation offering, as well as visitor friendly sightseeing, entertainment, leisure, food and beverage, retail activities is the number one opportunity for the SEA programme.

### Coastal Defences

The Coastal Defences Strategy is focussed on two key areas – maintaining (and improving) existing coastal defence infrastructure and the provision on new flood defence on the basis of predicted sea level rise of 90cm over the next 80 years (to be reviewed in line with UK predictions as necessary) and 1-in-50 year storm events.

Many areas along Guernsey's east coast, including Belgreve Bay, St Sampsons and St Peter Port, are currently impacted by wave and tidal flooding/overtopping during certain tides and this is predicted to worsen as sea levels rise and storm events become more frequent.

Protecting these areas from the impacts of sea level rise will be integral to ensuring the social, economic and environmental vitality of Guernsey's east coast. As such, the SEA programme should look to work with the Coastal Defences Strategy to identify where it may

be possible for developments arising from the SEA programme to include improvements to, or additional, coastal defences.

## Harbours

The primary challenge for Guernsey Harbours is to manage conflicts over the availability of space, both on land and water, and how to balance the competing and increasing demand from its wide range of users within a constrained site and without compromising other activities and safety.

The St Peter Port harbour has had to accommodate many wide-ranging and increasingly diverse demands over many decades, which together have constrained the existing port operation. On the water there is a wide mix of vessels, from large ferries to small sail training vessels, whilst on land there is a demand for a variety of commercial uses, in an area generally accommodating a wide range of non-port related public estate users. The Port has to meet UK maritime security regulations and these requirements have placed increasing restrictions and protection around the Harbours' commercial areas. It has already been evidenced that over time there is a growing need for these restricted zones to expand further into public-used space. Maritime security remains a very real driver in how the port develops in future and is one catalyst for future port development.

There are a number of opportunities which are driving Guernsey Harbours to review the current and future demands on the layout of the port, either in its existing or in a new location, and to facilitate the provision of safer, future-proofed and efficient lifeline services. The development of an expanded or new commercial harbour would support Guernsey Harbours to de-conflict both the water and land side uses of St Peter Port harbour. This could also result in significant amounts of land made available around St Peter Port harbour, which could be used to improve the harbour's offering to leisure port users, whilst a separate harbour for commercial use, depending on its location, could lead to significant improvements in the operational efficiencies of these users. This supports the principles of the SEA initiative.

Representatives highlighted, however, that Belgrave Bay and the Little Russell were extremely important as natural maritime habitats and that any development would need to give serious consideration of the potential disruption to the environment.

Representatives advised that Guernsey Harbours had identified the need for a significant future capital investment in St Peter Port Harbour (estimated currently at approx £33m) in order to maintain and protect the asset for future generations. Any further improvements to harbour infrastructure or providing additional facilities would be an additional cost to the £33m; and the future use of St Peter Port Harbour in light of any new port development, may have some impact on the quantum or priority of this future capital investment.

Fuel bunkering for superyachts represented one of a number of additional revenue opportunities for Guernsey. The market for superyachts is growing globally and a mixture of a strong geographic location and comparably low fuel prices meant that Guernsey is well positioned to take advantage of this market. However, current harbour facilities did not suit

all superyachts. The only berths in St Peter Port harbour that are most suited, in terms of size, were the commercial berths, which were also required for ferry services. Although physically able to accommodate superyachts, the facilities provided by these berths do not lend themselves to the accommodation of superyachts as the berths are located within the restricted zone of the harbour which does restrict access to and from the vessels for crew and suppliers.

Better use of harbour property would also result in social, economic and environmental benefit. Much of the large estate currently managed by Guernsey Harbours is in need of upgrading, and was not originally built for its current use. Many of these properties are located on prime seafront real estate, and with some level of investment, could support the SEA programme to achieve a number of aims, including expanding St Peter Port's offering in terms of recreational activities, retail, food and beverage, the arts, marina facilities and tourist product.

## **Appendix ii**

### **Vision**

To position Guernsey's east coast as a world class maritime location, thereby enhancing the socio-economic wellbeing of Guernsey as a whole.

### **Enhancement Objectives**

- To provide infrastructure that is of exceptional design and enables the effective and efficient functioning of the Island and gives opportunities for economic growth.
- To provide an environment that celebrates Guernsey's maritime culture and encourages people to live, work and play in the area.
- To take advantage of opportunities that will mitigate current and future threats to Guernsey.
- To achieve a mixed use of land that supports Guernsey as an economically strong, socially inclusive, and healthy island.
- To maintain and enhance the connection between the main centres along Guernsey's east coast and waterfront.

### **Enhancement Principles**

- Ensure any proposed enhancement are consistent with the Future Guernsey (Policy & Resource) Plan and its aims to create and maintain an economically strong, socially inclusive, and healthy island.
- Ensure enhancement is consistent with the Strategic Land Use Plan.
- Manage the built and natural environment in a way that balances the need to conserve, with the need to enhance, the quality of the built and natural environment.
- Manage the potential threats arising from changes to Guernsey's population level and demographics.
- Enable adequate access and movement for all.
- Seek to address the sometimes conflicting needs of all key user groups.
- Ensure enhancement is aligned with safety and security requirements of the east coast.

## Appendix iii

### Stakeholder Groups

Local Issues	St Peter Port Douzaine St Sampsons Douzaine Vale Douzaine Castel Douzaine St Saviours Douzaine Douzaine Council
Environment	La Societe Guernesais Floral Guernsey Friends of La Vallette
Fishing Industry	Guernsey Fishermans Association
Marine Trades	Guernsey Marine Trades Association
Freight	Ferryspeed
Passenger and Freight	Condor
Passenger and Freight	Sark Shipping Herm Trident
Leisure Port Users	Guernsey Boatowners Association Sailing Trust Guernsey Yacht Club Royal Channel Islands Yacht Club Junior Sailing
Leisure Boats	Oceanskies Boatworks+ Lovell Yachts
Cruise Industry	States of Guernsey
Business	Chamber of Commerce
Private Sector Involvement	Ravenscroft Private Investment Fund
Vehicular Access	Guernsey Motor Traders Association
Planning	States of Guernsey
Population Trends	States of Guernsey
High-Net-Worth-Individuals	States of Guernsey
Traffic	States of Guernsey
Disabilities/Accessibility	States of Guernsey
Energy	States of Guernsey
Inert Waste	States of Guernsey
Tourism	States of Guernsey
Coastal Defences	States of Guernsey
Harbours	States of Guernsey