Local Centres Survey 2020

Published March 2021









States of Guernsey
Planning Service

Local Centres Survey 2020

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Introduction

This is the fourth annual report monitoring Guernsey's seven Local Centres, as identified in the Island Development Plan (2016) (IDP)[1]. It includes the findings of desk-based research and on-site surveys of the Local Centres. The on-site surveys were undertaken in June 2020. The data collected and conclusions reached will be used in relation to the monitoring of the IDP. The purpose of the AMR is to monitor the effectiveness of IDP policies in delivering the land use aspects of the policy priorities of the States of Guernsey.

The Local Centres, as designated in the IDP, were identified in accordance with the direction given in the Strategic Land Use Plan 2011 (SLUP), through an assessment using sustainability indicators. The methodology used to identify the Local Centres is set out in the report 'Identifying Local Centres, July 2015'[2]. Following the adoption of the IDP in November 2016, the emphasis has moved from identification to monitoring the Local Centres, in particular the assessment of the level of provision of facilities within the Local Centres to ensure that policies are effective in maintaining the appropriate level, range and balance of uses which enable community growth and reinforce their sustainability. This is the fourth year of monitoring since the adoption of the IDP, therefore whilst emerging changes can be identified, there is insufficient evidence to draw conclusions on any long term trends.

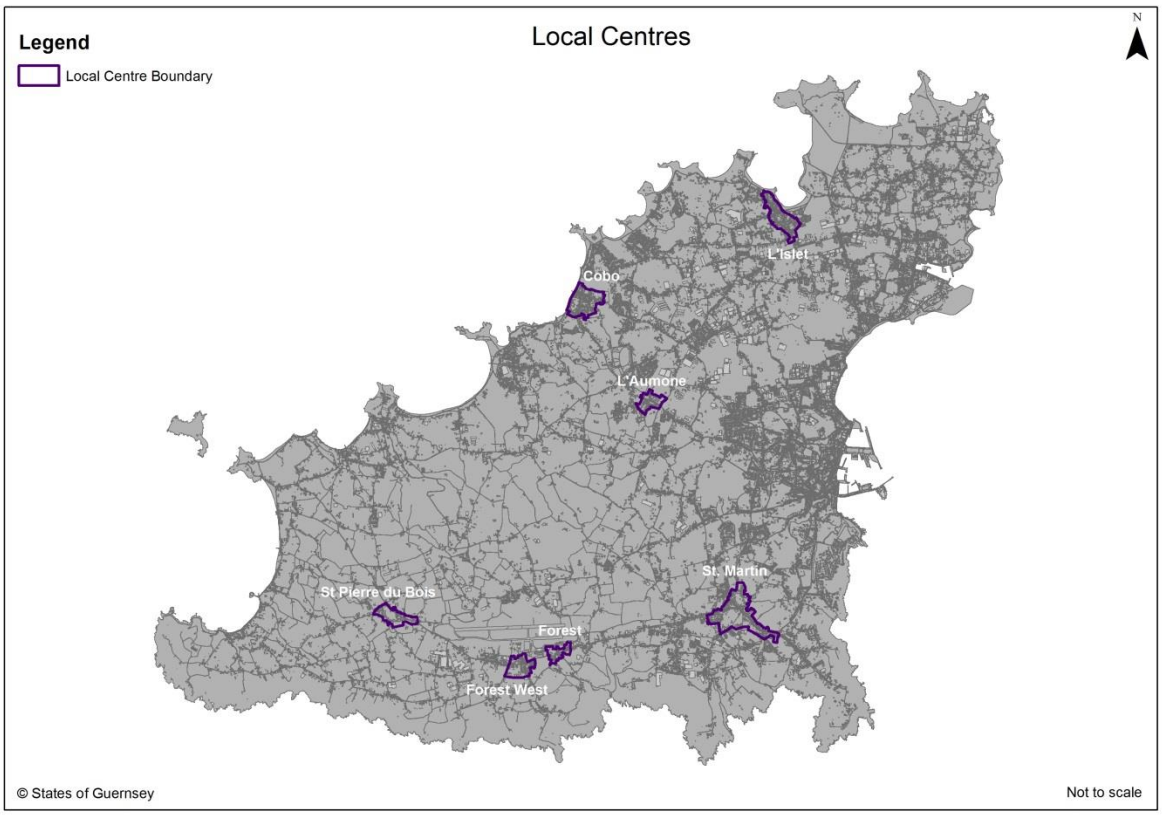
The seven Local Centres, as identified in the IDP, are as follows:

- Cobo;
- Forest;
- Forest West;
- L'Aumone;
- L'Islet;
- St Martin;
- St Pierre du Bois.

Map 1 on page 2 shows the location of each of these seven Local Centres.

[1] For clarity, references to the IDP in this document refer to the Island Development Plan, 2016.

[2] Report can be found here: *Identifying Local Centres Report, July 2015 [5Mb]*



Map 1: Local Centres in Guernsey

Policy Context

The SLUP sets out a spatial strategy for the distribution of development with which the IDP is consistent. As such, the Spatial Policy of the IDP is to concentrate the majority of new development in the Main Centres and Main Centre Outer Areas (St Peter Port and St Sampson/Vale) to maintain the vitality of these areas, to make provision for limited development in the Local Centres to support and enhance them as sustainable settlements and community focal points, and to allow limited provision for certain forms of development Outside of the Centres in identified specific circumstances.

The two Main Centres and Main Centre Outer Areas are therefore the focal points for development, providing the majority of shopping and employment uses and where the majority of new development is concentrated. The Local Centres are not intended as growth points, however they provide services essential to the community on a smaller scale, appropriate to the Local Centre concerned.

Within the IDP, Spatial Policy S3: Local Centres explains that opportunities for new development within the Local Centres will be limited and the extent of this will be determined by the current scale and function of each Local Centre to ensure that new development complements their existing roles and supports them as socially inclusive, healthy and sustainable communities. The scale of each of the Local Centres will be taken into account when considering proposals for development within them. In summary, development will be supported if: it sustains the socially inclusive and healthy communities that those Centres serve; is of a scale that reflects those Centres' existing functions; and, meets the requirements of the relevant specific policies of the IDP.

Possible appropriate development within Local Centres includes housing, social and community facilities, new offices and employment uses, visitor accommodation, leisure and recreation facilities, and convenience retail[3]. New comparison retail[4] units are not supported in the Local Centres, in order to protect the vitality and viability of Town and The Bridge as the main shopping destinations.

The IDP (paragraph 10.1.3) sets out that a sustainable Local Centre has a clear and identifiable mix of uses, including a general convenience store selling fresh food and produce which is, in particular, a necessary element for a Local Centre. A list of ten sustainability indicators is included in the IDP and these are:

- A general convenience store selling fresh produce
- A doctor's surgery
- A primary school/pre-school
- A bank or cash point
- An amenity area
- Community facilities
- Leisure and recreation facilities
- A post office
- A bus service
- Employment (e.g. offices, States of Guernsey buildings, industrial uses)

These elements are discussed below for each of the Local Centres, though the emphasis is now not on identification of Local Centres, but on monitoring to ensure that policies are effective in maintaining the appropriate level, range and balance of uses within them.

'A Retail Strategy for Guernsey', published in December 2013 and approved by the former Commerce and Employment Department of the States of Guernsey, provided a series of 'Strategy Proposals' which took into account a wide range of evidence and information (including the SLUP and the Roger Tym & Partners Retail Study, 2010). The SLUP required that this Strategy be taken into account when developing retail policies in the IDP. One of the 'guiding principles' of the Retail Strategy is to support the Main Centres and to diminish threats to them. This equates to supporting Local Centre enhancement proposals except those which would improve the comparison retail offering in that centre, which would be to the detriment of Guernsey's two biggest retail areas.

Related to Local Centres (though not exclusively bound to them) is policy GP19 of the IDP, which relates to Community Plans. Community Plans provide an opportunity for members of the public to set out a vision for improvements and change to a particular locality, whether this covers a small collection of homes or a wider settlement area. It is envisaged that Community Plans will generally be produced by the community for areas within the identified Local Centres, though equally they may be produced for other areas of the Island.

[3] Convenience retail is the selling of, often essential, daily items such as fresh produce and food and drink.
[4] Comparison retailing is the selling of goods, including clothing and footwear, furniture, furnishings and household equipment, which generally involves comparing similar goods before buying.

Community Plans provide an opportunity for members of the community to produce a vision for improvements to their local area, for example, that could bring about enhancements to the environment or other changes such as improvements to the public realm or traffic calming measures in a co-ordinated way. No Community Plans have been submitted to date.

A more detailed policy context can be found in the IDP in the Local Centres section[5].

Further details about Community Plans can be found in Supplementary Planning Guidance (see link below)[6].

During 2020, the Bailiwick of Guernsey faced an unprecedented public health and economic shock as a result of the Covid-19 pandemic and the socio-economic consequences pose a serious challenge for an unknown period. It is evident that many sectors of the economy such as tourism, hospitality, retail and construction have already been and continue to be severely affected. In June 2020, the Revive and Thrive Recovery Strategy was published (now known as Guernsey's "Recovery Strategy") which aims to guide and coordinate action plans to achieve recovery. In February 2021, a Policy Letter outlining proposals for the "Government Work Plan" was submitted and if approved, these proposals will set the strategic direction for the political term. The Plan was informed by the high-level Recovery Strategy. As such, it is important to be mindful of this and any secondary impacts that may occur from the Covid-19 pandemic when monitoring the Local Centre level of provision of facilities.

Aims and Methodology

The primary aim of the annual Local Centres Survey is to record the level of provision of facilities and services within each of the Local Centres to ensure that policies are effective at maintaining the appropriate level, range and balance of uses to support community growth and sustainable Centres. This is in accordance with the objectives of the IDP (including Plan Objective 3: Support a healthy and inclusive society) and paragraph 10.1.5 which specifically sets out this requirement for Local Centre monitoring.

In addition to the survey of facilities and services, information on other aspects of the Local Centres is also collected, such as public realm, local character and accessibility. This is because the IDP focuses on the individual nature of each Local Centre, requiring that development is appropriate and complementary to the scale and role of the particular Local Centre concerned. This additional information therefore gives some context to the survey data.

The survey in all respects represents a snapshot in time, and with certain elements there can be an element of subjectivity, although measures such as standard methodologies are used to try and manage any subjectivity.

The findings of this report therefore aim to give an overview of the following within each Local Centre:

[5] See Part Three – Local Centres: *Interactive Island Development Plan (2016) [16Mb]*

[6] See Community Plans Supplementary Planning Guidance *Community Plans SPG 2016 [238kb]*

- Range of IDP sustainability indicators present
- The mix of uses
- Public Realm
- Access
- Pedestrian and bicycle infrastructure
- Accessible parking and motorcycle parking
- Changes over time, for example in the range of uses or infrastructure provision
- Character and role of the Local Centre

In order improve the representation of the IDP sustainability indicators present in each Local Centre the findings now capture the last known use for vacancies within each of the Centres. For example, if there is a vacant employment unit then this unit still offers the potential to support employment in the Local Centre, even if it is currently vacant and as such this will still be recognised under the IDP sustainability indicators. The data that breaks down the mix of uses will still show the vacancies and will highlight the diversity of uses and whether there is an issue with non-residential vacancies, which supports the interpretation of the sustainability indicator data.

In order to present the mix of uses a breakdown of uses is provided for each Local Centre. For clarity, this breakdown of uses does not necessarily indicate the legal use class assigned to a unit, but follows a general categorisation which largely reflects the Land Planning and Development (Use Classes) Ordinance, 2017. The use of each unit is ascertained during the Local Centre survey, and not through assessment of historic planning application data, and is based on an assessment of the use (or uses) on site at the time of survey. The recognised use class of any site is only determined through a formal process and decision of the Development and Planning Authority.

Appendix 1 includes a map of each of the Local Centres to visually display the survey findings and therefore shows the IDP sustainability indicators and any additional information.

As an explanatory note, for the purposes of the Local Centre survey, public amenity includes, for example, Douzaine rooms, Parish halls, places of worship, dentists, schools, opticians, amongst other uses. Amenity areas are also included within this category, for the purposes of the Local Centre survey. 'Professional & Financial services' includes, for example, solicitors, architects, accountants and banks. 'Comparison retail trades' includes hairdressers, laundrettes, beauty salons and cobblers. 'Employment' also includes visitor accommodation units such as self-catering facilities.

Assessment of the public realm largely relates to the relationship between pedestrian and vehicular movements, though evidence is also collated on access and transport infrastructure (e.g. bus routes, footways, bicycle stands).

There are gaps in the current evidence base with regard to the role of the Local Centres. The most recent Retail Study (Roger Tym & Partners, 2010) considered the role of the Rural Centres as identified in the Rural Area Plan (RAP), which is now superseded by the IDP.

However this is now out of date and an updated retail study to include consideration of the role of each Local Centre would be beneficial to inform decision making in accordance with the IDP. For information, the Rural Centres as identified in the RAP and considered in the Roger Tym & Partners Study were St Martin, Cobo, St Pierre du Bois, Le Bourg/Forest and L'Islet, although the boundaries of these differ from those identified in the IDP. These were also the centres considered in the Retail Strategy (2013), which envisaged enhancement of these centres through enabling convenience retailing, whilst resisting increased comparison retailing.

Similarly, regarding character of the Local Centres, the Guernsey Character Study Stage 2 will be best placed to consider the individual characteristics and distinctiveness of the Local Centres, building on the information in the Guernsey Character Study Stage 1, but as yet this evidence is unavailable. As with the role of the Local Centres, such information would be beneficial to inform decision making in accordance with the IDP.

Local Centre Findings

Baseline statistics for each of the Local Centres are presented below in Table 1, including the number of sustainability indicators, out of the ten specified in the IDP, present in each of the Local Centres. An approximate residential density is given, based on a simple calculation of the number of dwellings per hectare (number of dwellings divided by the land area). The Local Centres are listed in order of size of Local Centre (largest first by land area).

Table 1: Baseline statistics relevant to the Local Centres

Local Centre	Number of indicators present	Size of Centre	Population at December 2019	Number of dwellings				Approximate residential density (dwellings per hectare)
				Dec 2016	Dec 2017	Dec 2018	Dec 2019	
St Martin	10	33.3ha (203v)	830	422	423	424	422	12.7
Cobo	8	17.7Ha (109v)	634	295	295	294	294	16.6
L'Islet	7	16.5ha (101v)	745	316	316	321	320	19.4
Forest West	7	10.7ha (65v)	323	146	146	146	146	13.6
St Pierre du Bois	8	10.7 ha (65v)	141	71	71	71	71	6.6
L'Aumone	5	7.9ha (48v)	359	114	114	114	112	14.2
Forest	5	5.8ha (35v)	111	34	34	34	34	5.8

As indicated, St Martin's Local Centre is the largest both in terms of area and population, and has all ten indicators present in the Local Centre. In terms of land area and population, Forest is the smallest Local Centre with 5 indicators present, although L'Aumone, which is second smallest in land area, also has 5 indicators. More detailed analysis is presented by Local Centre on page 8 onwards, starting with the largest Local Centre (St Martin).
The table above includes the dwellings figures for the last four years based on a consistent methodology to allow for comparison. As shown in Table 1, the numbers of dwellings in the Local Centres have remained stable. Please note that this report includes an appendix on page 36 that details corrected baseline statistics for Cobo, Forest and Forest West, which replaces the figures in the Local Centre reports published between 2017 through until 2019. The AMR 2018 includes thematic reports on both Housing and the Local Centres, and these reports look at planning approvals and housing delivery in the Local Centres in detail.

Local Centre Accessibility

In terms of accessibility, a revised bus timetable has been introduced and since 2018 and all of the Local Centres are now served by night buses on Friday and Saturday evenings. In 2019, there has been a reduction in the number of bus routes, with bus route 62 (Town terminus – airport) no longer operating. Bus route 62 was only introduced in 2018 and following a recent review of service use has been removed. Its loss does not materially affect the accessibility of any of the Local Centres. Aside from the above, there have been no considerable changes to the bus timetable during the year 2020. New speed limits were introduced on 7th April 2019 and this may help to address the negative impacts of motor vehicles and improve accessibility in Local Centres.

St Martin's Local Centre

As noted above, St Martin's Local Centre is the largest in terms of land area, population and the number of dwellings. However the approximate residential density is lower than that of L'Islet, Cobo and L'Aumone Local Centres, at 12.7 dwellings per hectare, reflecting the semi-rural character of the area and the areas of Important Open Land designated within the Local Centre. Conservation Area designations reflect the historic core of the Local Centre.

St Martin has a strong convenience and service offering, indicating its role as a convenience and service centre. However the environmental quality is poor, with no obvious focal point or street furniture.

All ten sustainability indicators are present in St Martin's Local Centre, as shown in Figure 1.

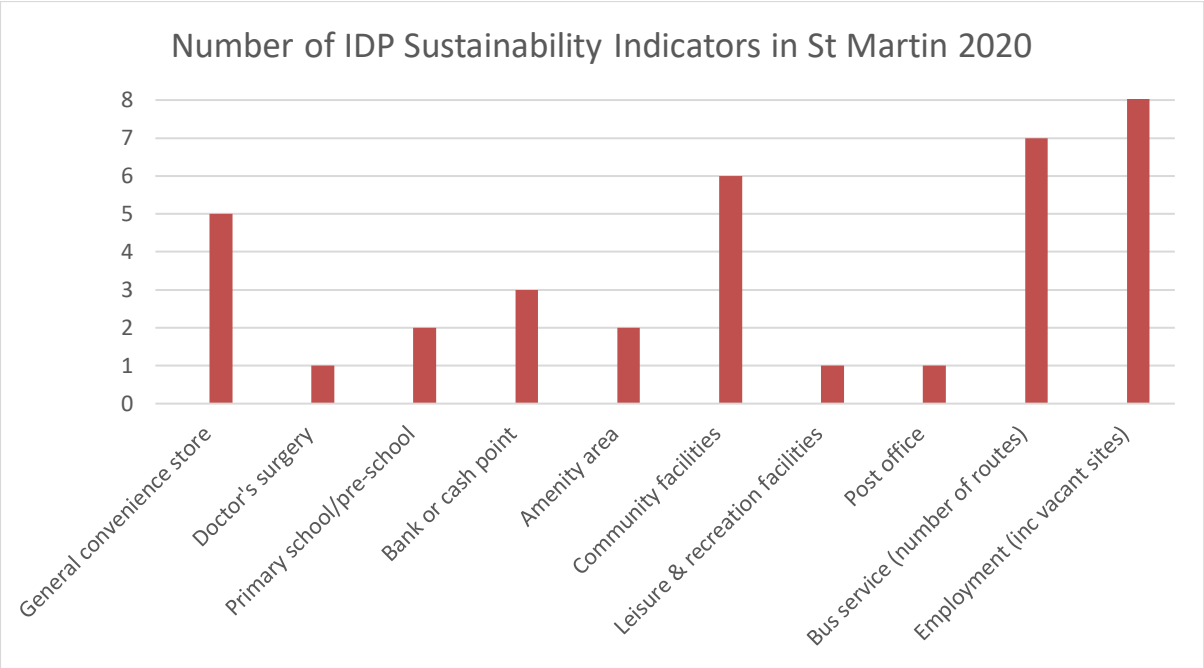


Figure 1: Number of IDP Sustainability Indicators present in St Martin's Local Centre 2020

As in 2019, the survey found a broad range of convenience and comparison shops, as well as comparison retail trades. There are also banks, employment opportunities, a primary school and pre-school, as well as a doctor's surgery. From a qualitative perspective, whilst there are amenity areas, this aspect is perhaps the weakest in terms of provision for the local community. Overall the Local Centre is very well provided for.

St Martin's Local Centre is also well served by public transport, with 7 bus routes serving the Local Centre at the time of survey including the N3 night bus. There are cycle racks at the rear of the Professor Shaw Community Centre. There are dedicated accessible parking spaces at St Martin's Parish Hall, The Professor Shaw Community Centre, and associated with Marks & Spencer, Co-Op Grande Marche, Iceland and Healthcare Pharmacy (Manor Stores), for example. The car park on La Grande Rue adjacent to Briarwood contains 6 dedicated motorcycle spaces.

Figure 2 gives an indication as to the balance of different uses.

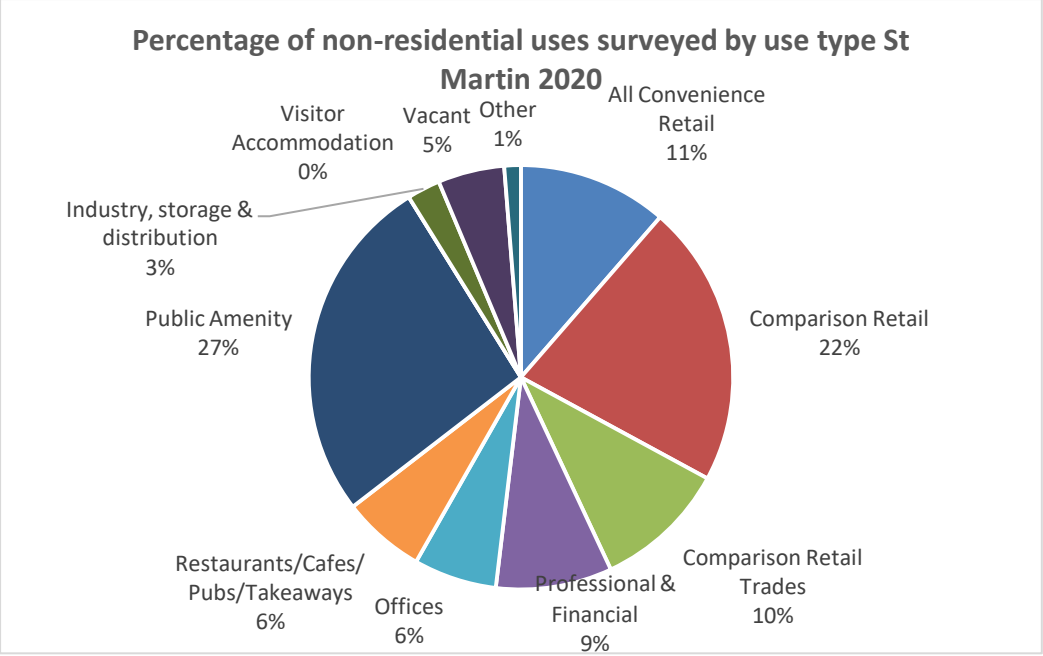


Figure 2: Percentage of total non-residential uses surveyed by use type (St Martin)

Of the units surveyed, 32% were in use either as comparison retail or comparison retail trades. The 'Other' category represents Le Grand Courtil, which is residential but offers employment opportunities because of the nature of the accommodation offered. Gilbert's Community Café, The Russels Day Centre and Kimmies hairdresser, which are located within Le Grand Courtil, are counted as separate uses to better reflect the diversity of St Martin.

11% of units were convenience retail, including the general convenience retail units as included in the indicator above, and also pharmacies (of which there are two) and the bakery (Senners).

There is a significant proportion of public amenity type uses, including dentists, doctors, school, churches and the Douzaine and Parish halls (27%). Such uses serve the local community and are appropriate for a Local Centre, and in accordance with policy LC3(A), dual use of such facilities is encouraged.

Restaurants/Cafes/Pubs/Takeaways account for 6% of the uses in the Local Centre, and include The Queens Inn, The Green Hut, Saffron Indian, Mayflower and the Gilberts Community Cafe, the restaurant at Le Grand Courtil which is also open to non-residents. There is no permanent café in St Martin's Local Centre, although drinks and cakes are served at the Saturday morning Farmers Market hosted in the Parish Hall during certain months of the year.

In terms of changes in the St Martin's Local Centre since 2019, two vacant employment units have since been occupied (Nordben and Cognet offices) resulting in a decrease in the number of vacancies from 8% (2019) to 5% (2020). As such, there has been an increase in the proportion of professional and financial services (9%).

In total, there are four vacancies noted at the time of survey and these include the former Acorn Lifestyle, St Martins Hotel, the Wine Warehouse (which is now part of Iceland) and Envy hairdressers. It is however worth noting that the former envy hairdresser's retail unit has recently had planning approval for change of use from hairdresser (Retail use class 10) to Health Clinic (Public amenity Use Class 18). As such, whilst this unit is still vacant this change of use has still been noted during the survey for when the unit does become occupied.

There had been no improvements to the public realm noted during the survey and the issue of conflict between pedestrians and vehicles in the Local Centre, including the regular mounting of the pavement along La Grande Rue by larger vehicles to enable oncoming traffic to pass, is ongoing. There are infrequent crossing points and the east side of La Grande Rue lacks a dedicated pedestrian footway. The busy road therefore splits the Local Centre which feels dominated by traffic as a result.

The pedestrian links and connectivity between the main community uses (e.g. St Martin's Primary School, Professor Shaw Community Centre, St Martin's Parish Hall and St Martin's Parish Church) are impeded by this dominance of traffic and crossing the road is difficult, for example around the filter junction between La Grande Rue and Rue Maze, and also when accessing some of the shops (e.g. crossing from the car park to Valpys).

Generally the Local Centre retains a broad range of uses and has seen a reduction in the number of vacancies Overall it is still lacking in amenity areas, especially when considered in relation to the size of the Local Centre. Measures to tackle the dominance of traffic could improve the public realm of the Local Centre, and additional cycle stands and pedestrian infrastructure relating to the retail and community uses could aid accessibility of the Centre.

Cobo Local Centre

Cobo Local Centre is the second largest of the seven Local Centres, with the second highest residential density at 16.6 dwellings per hectare (L'Islet has the highest density). Cobo is a compact Local Centre within an area described as semi-rural, which links both with the coast and more rural inland areas.

There are non-residential units scattered throughout the Local Centre, including The Rockmount (public house), La Reunion (restaurant), Cobo Bay Hotel and Cobo Tea Rooms along the coastal road, and Iceland food store, Cobo Fish and Chip Bar and Cobo Village general stores around the junction of Cobo Coast Road and Route de Carteret. The Local Centre serves both the local community and visitors to the beach and related facilities.

Cobo Local Centre, at the time of survey, had eight of the ten sustainability indicators present, as shown in Figure 3, which is the same as in 2019.

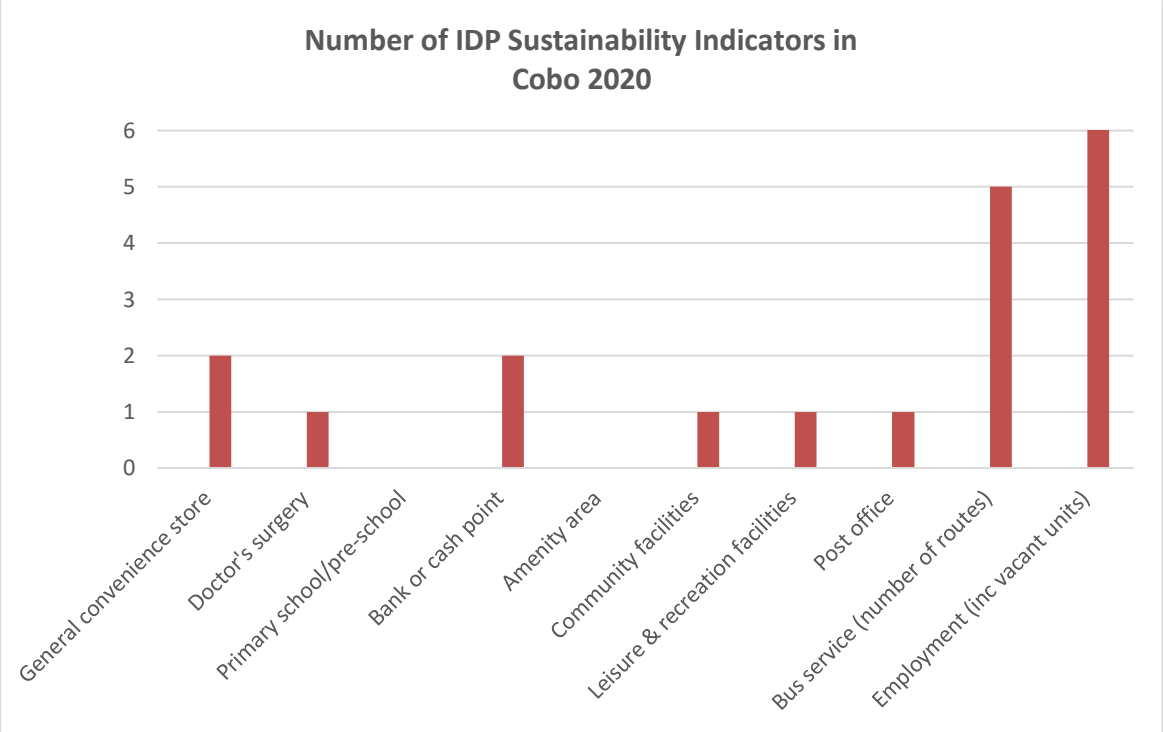


Figure 3: Number of IDP Sustainability Indicators present in Cobo Local Centre 2020

There are convenience and comparison retail shops and trades, places to eat, bus services, bank and employment opportunities, as well as public amenity uses and community and leisure/recreation facilities. There is no primary school or pre-school within Cobo Local Centre, however La Mare de Carteret School adjoins the Local Centre boundary, with the result that the Centre has easy access to a primary school and a secondary school. Following the announcement that the La Mare de Carteret Secondary School will no longer be needed due to the transition to a one school across two sites model, it is likely that this school will no longer exist in the future. However, it is important to note that the States decided to 'Pause and Review' this two school model in March 2020. As such, any changes to this review will be monitored in relation to the above.

There are no defined amenity areas within the Local Centre boundary, but again the fields at La Mare de Carteret School provide such space, as does the beach, and there is an adjacent Nature Walk providing pedestrian access to Saumarez Park. There is a place of worship in Cobo Local Centre, and outside of the Centre but close to it, there are good quality community facilities at Cobo Community Centre at The Guet.

In terms of accessibility, Cobo Local Centre was served by 5 bus routes at the time of survey, including the provision of the N2 night busCycle racks at Iceland complement the other transport options to and around the Local Centre. There are dedicated accessible parking spaces and motorcycle parking spaces by Iceland, and accessible parking spaces associated with Cobo Bay Hotel and the Rockmount/La Reunion. It is also worth noting that a new defibrillator was installed on the front (west) elevation of the Rockmount.

There were no improvements to pedestrian infrastructure noted during the survey, and crossing the busy coast road from the Local Centre to the beach is still difficult at times given the volume of traffic and the lack of a formal pedestrian crossing.
There are generally footways on one side of the road throughout Cobo Local Centre, but these are narrow in places and it can be difficult for groups of pedestrians to pass during busy periods, which impedes pedestrian flow. However, the Local Centre is compact, and the flat terrain aids walkability throughout the Local Centre. During 2020, essential maintenance and repair works to the sea wall along the Cobo coast road commenced whih demonstrates the continued effort to maintain and invest in the coastal defences within this area.

Figure 4 shows the balance of different use types within Cobo Local Centre.

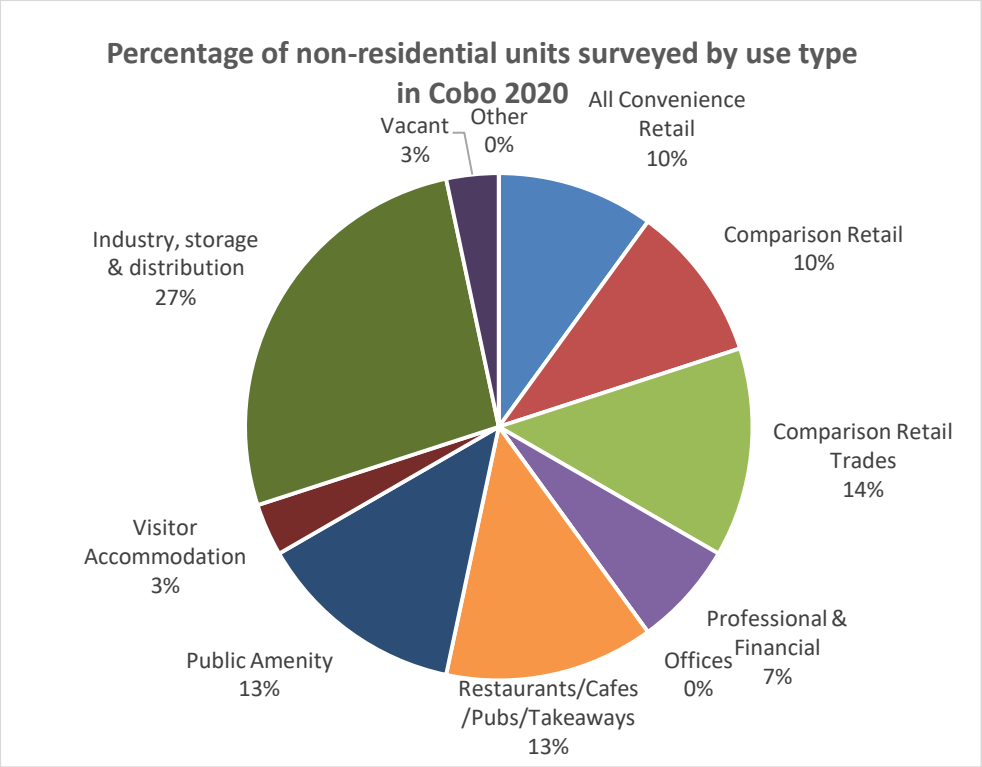


Figure 4: Percentage of total non-residential uses surveyed by use type (Cobo)

Figure 4 shows that there is a relatively high proportion of Industry, Storage and Distribution units within the Cobo Local Centre (27%) and this has more than doubled since 2018 and has continued to increase during 2020. In 2019 five light industrial units were erected following planning approval and this year the growth comes from a previously vacant industrial unit which is now occupied by the CAR Cobo Auto Repairs.

As shown, even though the proportion of comparison retail/comparison retail trade has decreased since the 2018 survey, it has remained the same this year and continues to remain relatively high (24%), when compared to convenience retail (10%). Please note that IDP policies do not allow for new comparison retail in the Local Centres, but this balance of uses will continue to be monitored.

The public amenity category includes the doctor's surgery, opticians and Cobo Mission Hall, and the 'Industry, storage and distribution' category includes Guernsey Glass Craft and Cobo Motors. The Rockmount, La Reunion, Cobo Bay Tea Rooms and Cobo Fish and Chip Bar make up the Restaurant/Cafe/Pub/Takeaways category.

The 2019 survey noted that there were two vacancies, however this year there is only one vacancy.

La Reunion (1st floor) has been recorded separately to the Rockmount under Restaurants/Cafes/Pubs/Takeaways to provide a better representation of the mix of uses within the Local Centre.

At the time of the survey, in terms of the pedestrian environment, no improvements or enhancements had been made at the time of survey and the public realm remained unaltered (apart from the sea wall maintenance along the cobo coast road, as mentioned previously)

In addition to the above, work has commenced, to create a new retail unit at the ground floor level (convenience store) along the Route de Carteret. The Warma development has also commenced works to erect 13 new dwellings along the Route de Carteret.

Overall the Local Centre appears well served for its role of meeting the needs of visitors and locals, but given the size of the Local Centre and the number of non-residential units available, small changes to provision could have the potential to have significant effects on the mix of uses. With this in mind, as industry, storage and distribution has more than doubled within the Local Centre since 2018and continues to slightly increase this year, it will be important to continue to monitor this increase and any impacts this may have on the diversity of use. At this point in time, this continued increase does not raise any great concerns for the mix of uses, as this increase comes from a previously vacant industry storage and distribution unit and as such does not represent a new area of industrial use.

L'Islet Local Centre

L'Islet is the third largest of the Local Centres and the most densely populated (approximately 19.4 dwellings per hectare). The Local Centre is quite linear, with a group of commercial units clustered around the crossroads. It lies within a semi-rural area and has easy access to the coast.

Figure 5 shows the number of each of the IDP sustainability indicators present in the Local Centre.

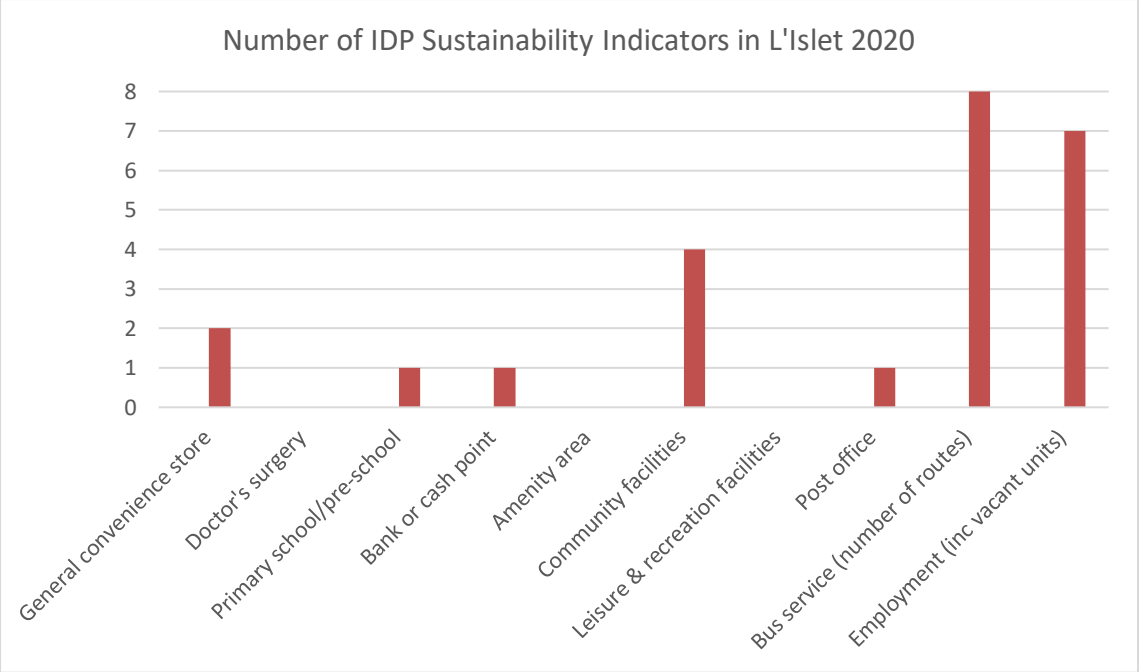


Figure 5: Number of IDP Sustainability Indicators present in L'Islet Local Centre 2020

The Centre is reasonably well served, with two churches, convenience stores and cash point, however there is no doctor's surgery within the Local Centre boundary. There are opportunities for employment, however there are five vacancies within the Local Centre at the time of survey (including employment units, e.g. at the Bakery Complex). Given the range of facilities and location of L'Islet Local Centre, it is likely that the retail offering serves the local population as well as people working in the locality, given the number of employment sites.

There are no amenity areas within the Local Centre boundary, though there is easy access to the coast which lies outside but adjacent to the Local Centre. Eight bus routes were noted to serve the Local Centre at the time of survey, including the P2 which connects to the Bridge, the Princess Elizabeth Hospital and Town.

Figure 6 shows the percentage of non-residential uses by use type.

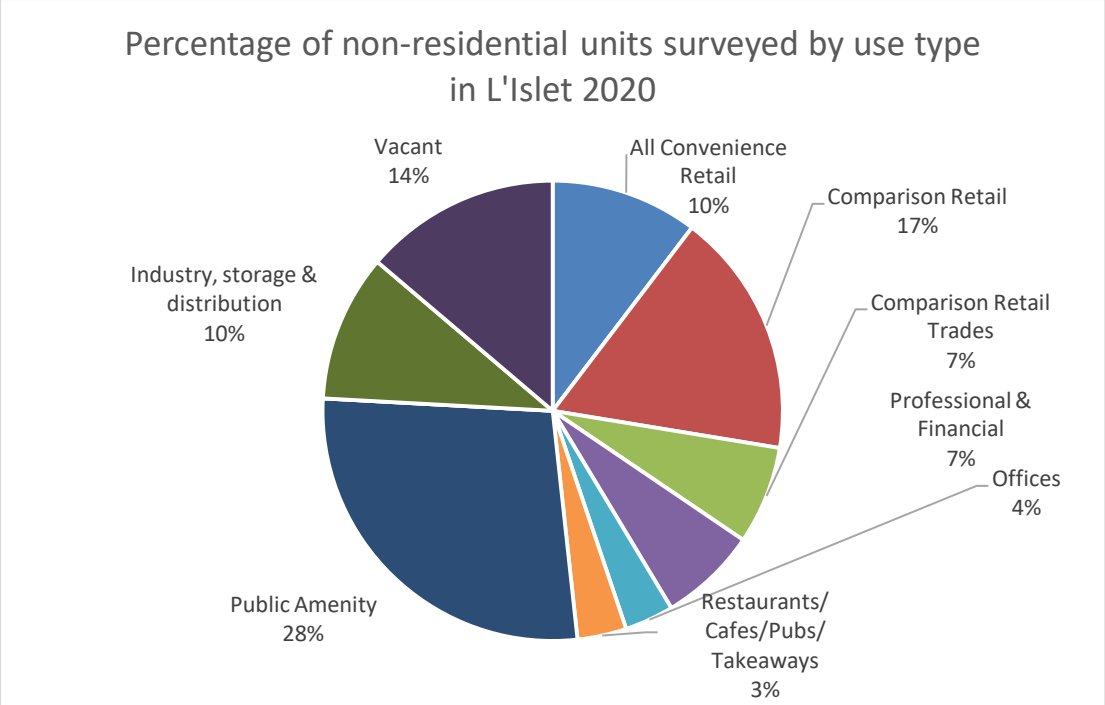


Figure 6: Percentage of total non-residential uses surveyed by use type (L'Islet)

This year there has been a decrease by one vacancy from the 2019 survey. This was due to a former vacant hairdresser unit changing to residential use and as such results in a loss of comparison retail opportunity within this Local Centre. The IDP policies do not allow for new comparison retail in the Local Centres, and as such this loss will not be regained elsewhere within this Local Centre. Despite this, comparison retail still stands at a relatively high percentage when comparing the mix of uses (17%). Please note, that last year in 2019 Tux and Tails (comparison retail unit) was changed to residential use, however this year's survey has established that the business is still in operation and as such has been included under the non-residential uses.

The occupier for the former Gale Builders workshop has changed to Guernsey Building Renovations Ltd which provides a diverse range of building services. There is planning approval to demolish this workshop and erect a convenience store with ancillary office, however this had not been implemented at the time of survey.

Since 2019, there has been a decrease n one employment unit as the former Unit 2b (which previously counted under Industry, Storage and Distribution) is now occupied by First Dental Hygeine/Roseneath Dental Practice and which has resulted in an increase in public amenity (29%).

In terms of public amenity uses, this includes Isabelle Vets, Dental Hygeine/Roseneath Dental Practice, St Marys Church, St Mary's Community Centre and Little Cottage Day Care, amongst others.

The Centre lacks pedestrian crossing facilities which can make it difficult for pedestrians, particularly around the crossroads, and pavements are generally on one side of the road. No bicycle stands or other bicycle infrastructure was noted during the survey. There are

accessible parking spaces and a dedicated motorcycle parking area associated with Marks & Spencer. The crossroads at the centre of the Local Centre provides a focal point but there is limited public realm in the Centre. There have been no improvements to the pedestrian environment or public realm in 2020.

Overall the Local Centre provides a good balance of uses including several employment opportunities. The main changes include one decrease in vacancy as a result of the former Hi-style hairdressers changing to residential use) and a decrease in an employment use to a dental practice which has resulted in an additional public amenity unit (Dental Hygeine/Roseneath Dental Practice) within the Local Centre. However, all other types of uses have remained largely the same. The public realm is still traffic dominated and there is limited pedestrian and cycle infrastructure, although the public transport connections are good. Improvements to the public realm for pedestrians would benefit the Local Centre.

Forest West Local Centre

Forest West Local Centre lies to the west of the airport and covers an area of approximately 10.7hectares (65vergées). There are approximately 13.6 dwellings per hectare. There are two clusters of non-residential uses, one of which centres on the two schools (Forest School and Le Rondin School) and the petrol station, the second of which is The Mallard Complex and neighbouring Venture Inn. Other non-residential uses not within these clusters are Bodyline Car Repairs and the Forest Chip Inn.

Forest West lies within a semi-rural area and has a rural feel in part due to the views into and across more rural adjoining areas.

It is likely that, along with Forest, this Local Centre serves both the local population in the southern part of the Island as well as passing trade. In itself, the Mallard Complex has a broader catchment area, given the presence of the Mallard Cinema in particular.

At the time of the on-site survey Forest West had seven of the ten sustainability indicators present as shown in Figure 7.

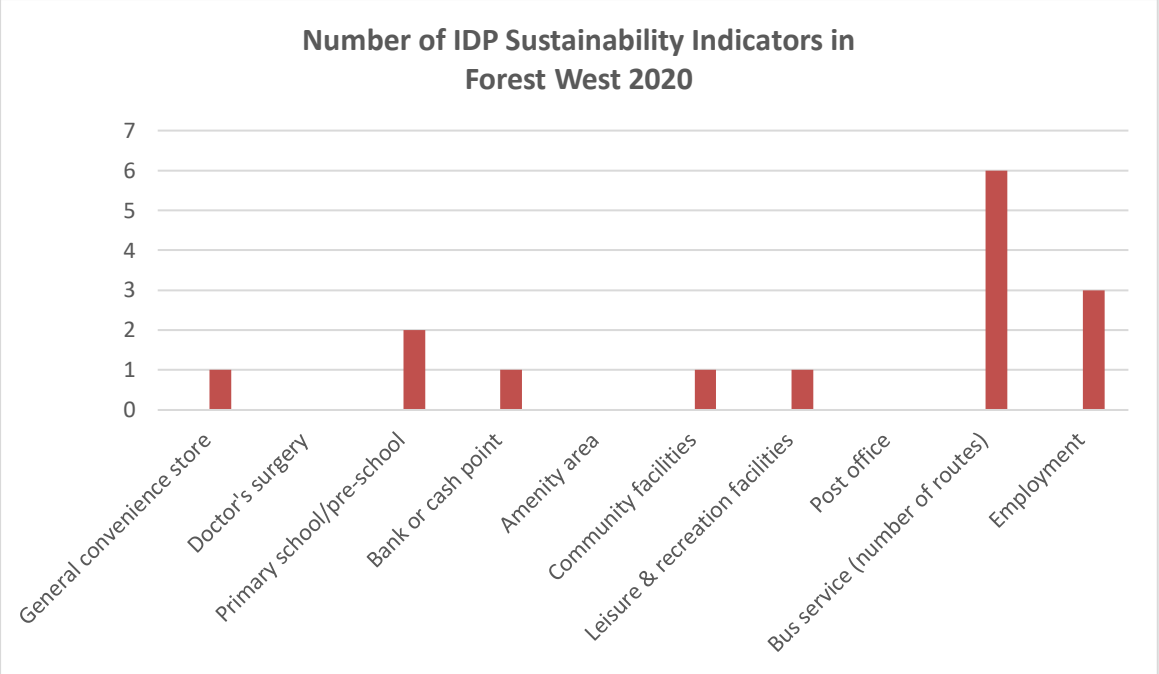


Figure 7: Number of IDP Sustainability Indicators present in Forest West Local Centre 2019

There is no doctor's surgery, amenity area or post office in the Local Centre, however there are two schools, a convenience store (Co-Op En Route) and petrol station, community facilities and employment opportunities, as well as a variety of facilities and opportunities at the Mallard complex, including the cinema, hairdresser and restaurant.

Frequent bus services (6 routes including the N3 night bus) connect the Local Centre with the airport, St Martin's Local Centre and Town. There are pavements on one side of the road in the Local Centre and a pedestrian crossing which links the two schools and enables pedestrians to cross the busy road safely between the two schools. The 'Filter-In-Turn' at the junction of Rue des Landes/Rue de la Villiaze also acts as a traffic calming measure.

No bicycle stands or other relevant infrastructure was noted during the on-site survey. Accessible parking spaces were noted at the Forest Chip Inn, the Mallard Complex, Forest School and Le Rondin School. Dedicated motorcycle parking is available associated with Le Rondin School.

Figure 8 shows the percentage of non-residential uses surveyed by use type.

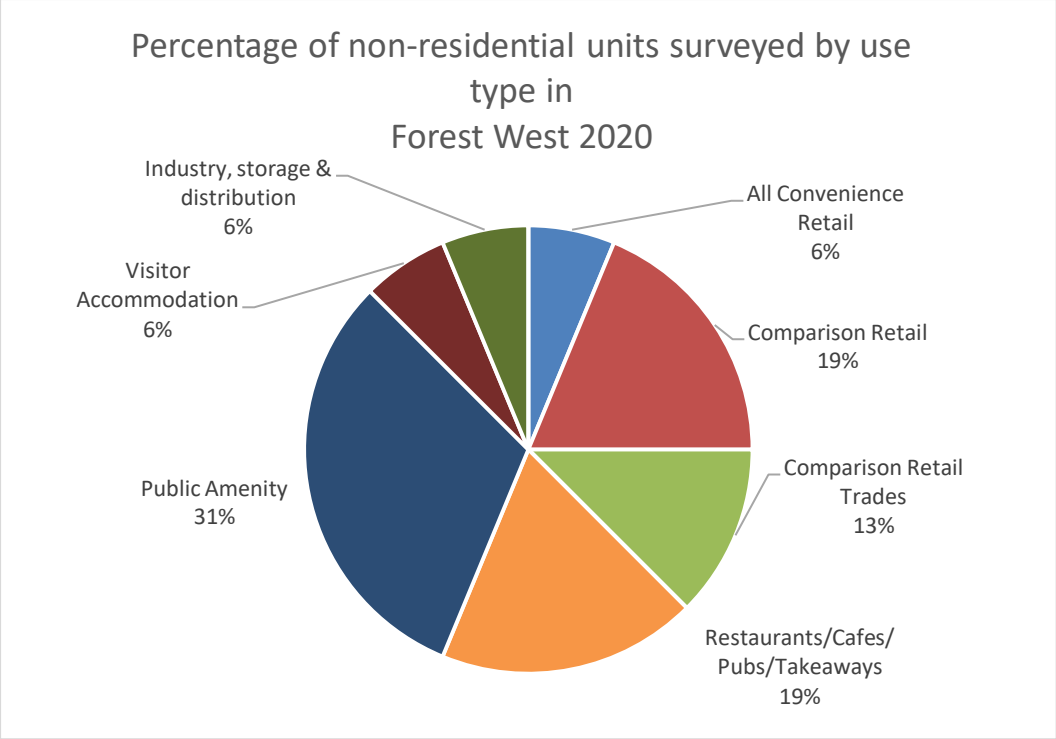


Figure 8: Percentage of total non-residential uses surveyed by use type (Forest West)

Since last year's survey the mix and range of uses have remained the same. The comparison retail category is made up of the car and petrol sales outlets, whilst the comparison retail trades include Hobson's Hair and Karma Beauty at the Mallard Complex. The percentage of public amenity uses is high (31%) and includes both Le Rondin School and Forest Primary School, as well as the Forest Douzaine Room. The restaurants/cafes/pubs/takeaways are made up of the Forest Chip Inn, Venture Inn and China China Restaurant (19%).

The uses of Forest West are complemented by those of Forest which is a short distance to the East, along with facilities at the airport. The bus connections are good to the area as the airport acts a local transport hub with taxi rank as well as bus stop. The area does, however, lack amenity areas, access to a doctor's surgery and post office.

St Pierre Du Bois (St Peter's) Local Centre

St Pierre Du Bois Local Centre is one of the least densely populated of the Local Centres (approximately 6.6 dwellings per hectare). The Centre lies within an area described as 'Rural' and there are areas of land designated as Important Open Land within the Centre, protecting the rural nature and lower densities of development of the Local Centre. The St Pierre du Bois Church Conservation Area falls partly within the Local Centre, encompassing the Church and associated historic cluster of development. Given the location of St Pierre du Bois Local Centre, it is likely that it serves a local rural catchment.

The Local Centre is somewhat split by the roads which run through it with Route du Longfrie acting as more of a through route (though providing access to the Post Office and Longfrie Public House) whilst Rue des Brehauts is less busy and leads to the quieter space and focal point of St Peter's Parish Church.

Non-residential uses are distributed throughout the Local Centre, although the community uses are predominantly to the west and the commercial uses to the east of the centre.

At the time of survey, 8 of the 10 sustainability indicators were noted in the Local Centre, as shown in Figure 9.

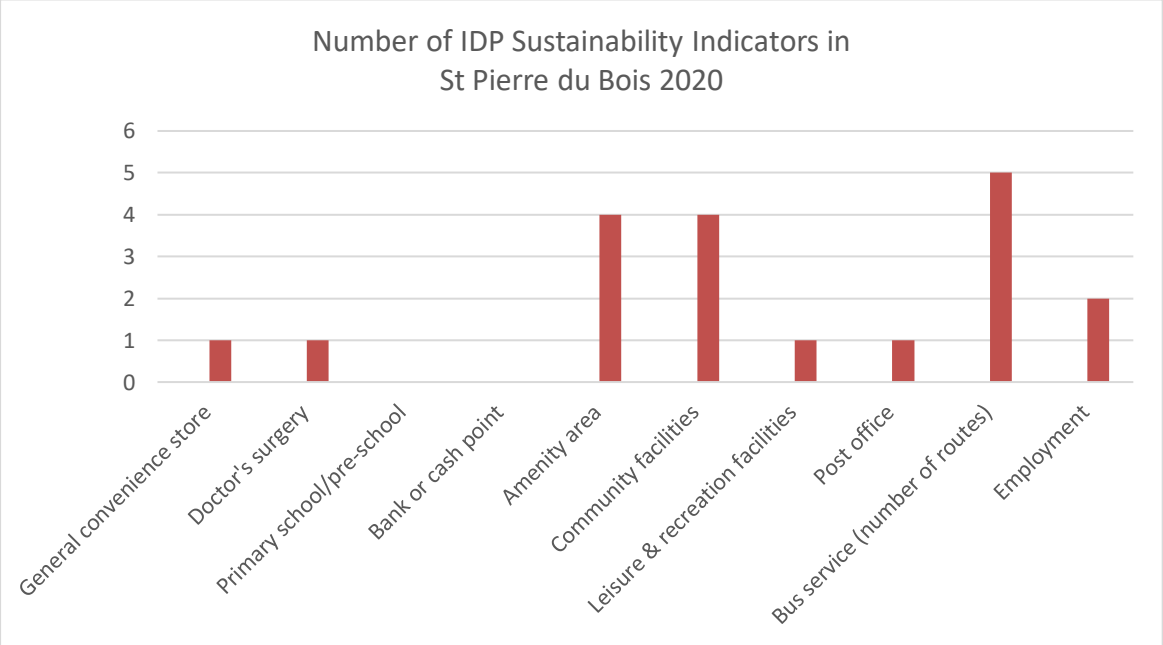


Figure 9: Number of IDP Sustainability Indicators present in St Pierre du Bois Local Centre 2020

St Pierre du Bois Local Centre has a good range of services and facilities including post office, pub, food hall, doctor's surgery, pharmacy and amenity areas. There is no primary school, and no pre-school was noted within the Local Centre at the time of survey. This year there has been an increase in the number of amenity areas, with a new area identified within the survey at the back of the post office car park. This community garden provides a small enclosed green space with benches and bird boxes with a 'Guernsey Together' theme throughout.

Figure 10 shows the balance of the non-residential uses within the Local Centre.

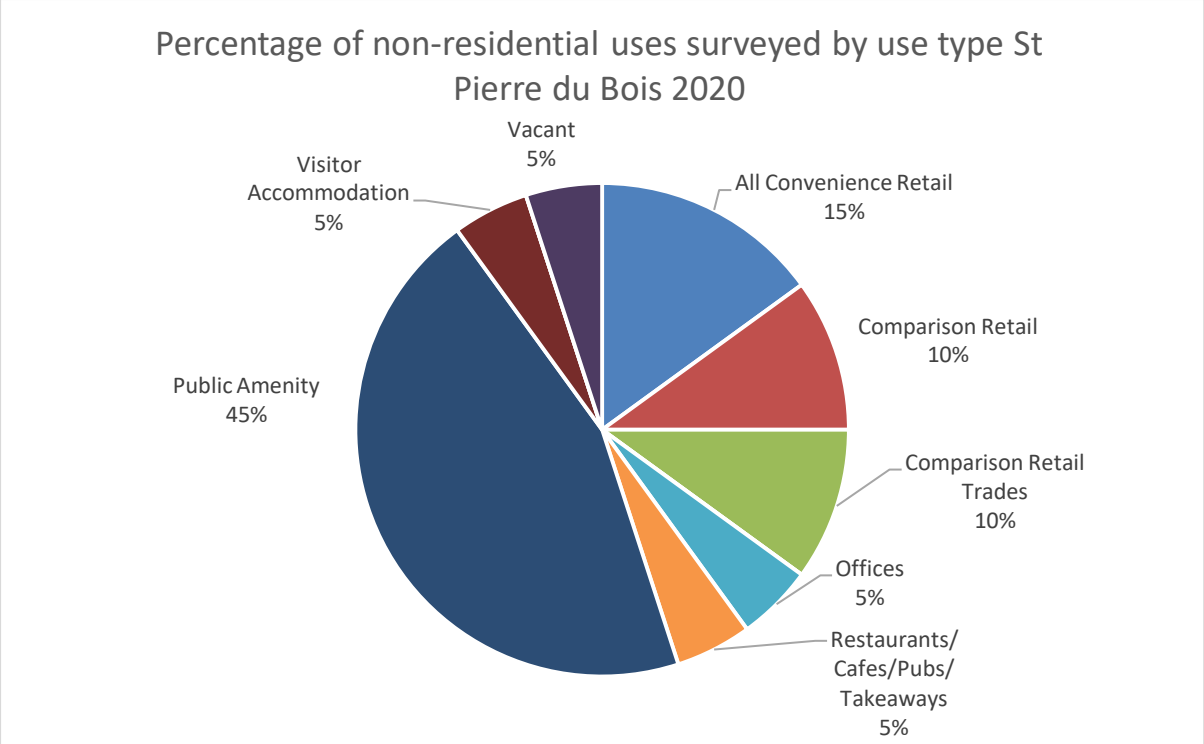


Figure 10: Percentage of total non-residential uses surveyed by use type (St Pierre du Bois)

The public amenity uses include the church, the play area adjacent Styx, the Douzaine Room, community garden with a 'Guernsey Together' theme, community hall and community centre, with the football pitch and training area nearby but outside the Local Centre boundary, so St Peters is well served in this regard and this contributes to some of the character of the Local Centre. As in 2019, the former Natwest Bank premises are still vacant. A minor change observed during the survey was that the Comparison Retail unit has changed occupiers to 'Tips and Toes' nail shop

The pedestrian environment of St Pierre du Bois was reasonable but the filter in turn junction at Route de Longfrie was found to impede the pedestrian access to the general convenience store. There are generally pavements on one side of the roads in the Local Centre, though some of the roads have no pedestrian provision and crossing points could be improved.

2018 saw a consultation on the installation of a raised table at the junction of Route de Longfrie and Route de Lihou, proposed in response to ongoing speed and road safety concerns in the area. In July 2019, the raised table was installed at the junction and any evidence that details the impacts this change has on the speed and road safety will be monitored.

No bicycle stands or other cycle infrastructure was noted during the survey. Dedicated accessible car parking spaces can be found at St Peters Food Hall, Styx Community Centre and at Longfrie Surgery.

L'Aumone Local Centre

L'Aumone Local Centre, whilst not the smallest of the Local Centres, has only five of the ten indicators present. However it remains an important Local Centre lying within a semi-rural area. It has an approximate residential density of 14.2 dwellings per hectare, making it the third most densely populated of the Local Centres (L'Islet and Cobo being more densely populated). L'Aumone serves a predominantly residential area as it lies within reasonable walking distance of several residential areas, including L'Aumone Estate, Le Villocq Estate, Courtil Ollivier and estates off Rue de la Perruque and Rue du Presbytere.

Figure 11 shows the number of each of the indicators present.

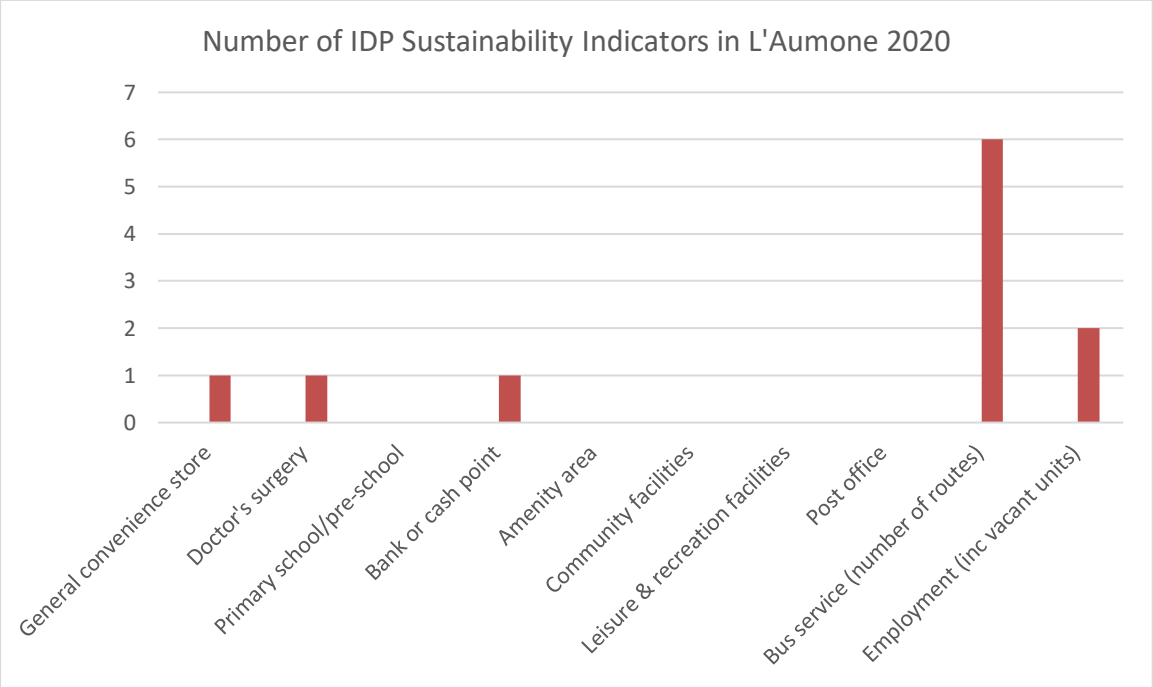


Figure 11: Number of IDP Sustainability Indicators present in L'Aumone Local Centre 2020

There are 5 of the 10 IDP indicators present in L'Aumone, including the doctors, convenience store and cash point. There was no school or pre-school, post office, amenity area or community facilities in L'Aumone at the time of the survey. The Centre is well served by bus routes which connect to Town, the west coast and north to L'Islet.

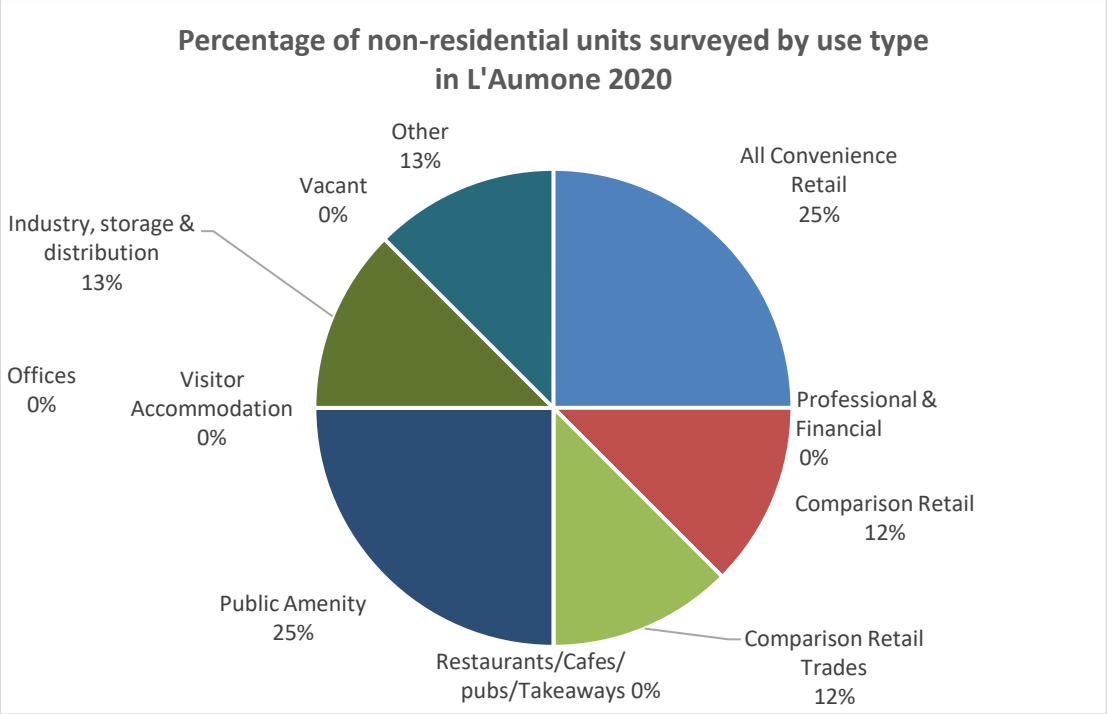


Figure 12: Percentage of total non-residential uses surveyed by use type (L'Aumone)

The comparison retail relates to petrol sales, and the 'other' uses comprise the residential home (which provides an employment opportunity). Convenience retail incorporates both the Co-Op En Route and also the pharmacy.

The percentage of public amenity uses has increased this year from 14% in 2019 to 25% in 2020. This increase comes from a residential unit changing to a spa facility (The Floatroom Guernsey). The Doctor's surgery is also included within the public amenity category.

Outside of the Local Centre boundary, Le Friquet Garden Centre provides additional facilities within a short walking distance of L'Aumone Local Centre (including a café with a soft play area). Further away, but still within walking distance, are the current Grammar School and Sixth Form site on Rue des Varendes and the football ground and sports facilities at Footes Lane. However it is important to note that there may be changes to the Grammar School and Sixth Form site in the future, due to the proposed move to a one-school, two site secondary education model. Although it is recognised that the States in March 2020 decided to 'Pause & Review' this two school model approach. As such, any further changes will be reported in the future as and when information becomes available.

L'Aumone Local Centre lies adjacent to the Castel Hospital site and close to other sites of considerable size that are in States of Guernsey ownership. Where these sites are becoming obsolete or not fit for purpose there may be scope for considerable opportunities for development through IDP Policy S6: Strategic Opportunity Sites.

There were no bicycle stands or motorcycle parking provision noted during the survey. Accessible parking bays are provided at L'Aumone surgery. The pedestrian environment was considered to be good as there are pavements on both sides of the road and there is a pedestrian crossing on the main route through the Local Centre.

In 2019, there were two vacancies noted at the time of the survey (the former Jo Jo's Salon and Smart Plasterers), however, this year both these vacancies have been occupied with The Looker – Haircuts by Chanya and S.M.T & L.Le p Plasterers.

L'Aumone continues to offer fewer facilities and services than some of the other Local Centres, it will be important to monitor these going forward, to ensure the range remains proportionate to the community it serves. There has been an increase in public amenity uses and there were no vacancies identified this year. In addition to this, the Local Centre lacks amenity areas and community facilities.

Forest Local Centre

Forest is the smallest of the Local Centres in terms of land area, population and the number of dwellings. It has an approximate residential density of 5.8 dwellings per hectare, equal to St Peter's Local Centre. The Forest Church Conservation Area falls partly within the Local Centre, centred on the church and the small enclave of historic buildings around it. This historic hamlet, the well-cared for public realm and the rural setting, provide Forest Local Centre with a distinctive character.

Forest Local Centre is likely to serve a wide catchment due to the popularity of Forest Stores, as well as serving the local population and passing trade.

Five of the ten indicators were present at the time of survey, as shown in Figure 13.

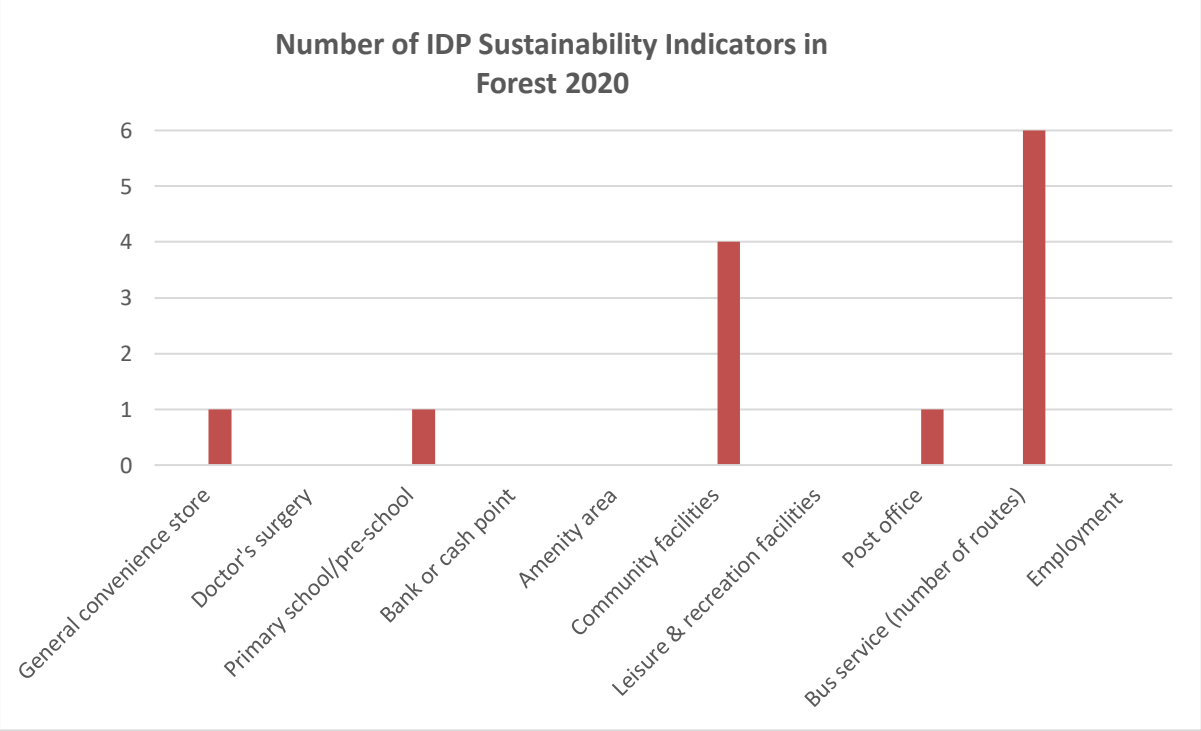


Figure 13: Number of IDP Sustainability Indicators present in Forest Local Centre 2020

There is no bank/cash point, doctor's surgery, amenity areas or employment opportunities within the Local Centre. However, there are good bus routes and the area is well linked to

the airport, which in itself provides opportunities, as does Forest West Local Centre which provides complementary facilities and services. Crossing the busy road remains difficult at times with no formal crossing point, and there are no facilities for cyclists visiting the centre. No dedicated motorcycle, bicycle or accessible parking was noted during the survey.

Forest Stores provides a strong anchor for the Local Centre which includes a post office, and there are two pubs, two churches and a pre-school. In terms of the scale of provision, given that this is the smallest of the Local Centres the relative level of provision is reasonable and the bus connections to St Martin and Town are good.

Figure 14 shows the relative breakdown of uses by use type.

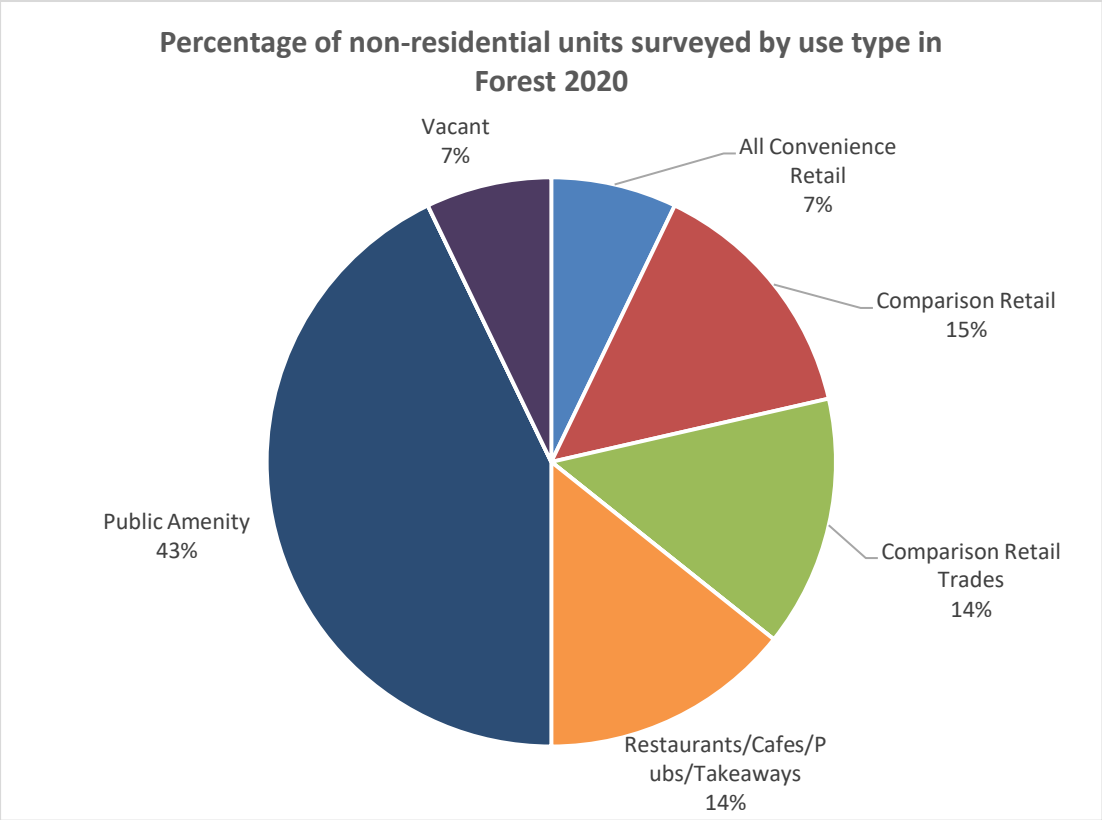


Figure 14: Percentage of total non-residential uses surveyed by use type (Forest)

The 'Public Amenity' uses in Forest Local Centre include the two churches, church hall and Air Scout hut. The Deerhound and Happy Landings constitute the Restaurant/Café/Pub category.

This year there is only one vacancy (reduced from two vacancies identified in the 2019 survey). One unit has now been occupied by Tim Falla Bedrooms, Kitchens and bathrooms, whist the former forest motors is a notable vacancy that remains in place for 2020.

Overall the Local Centre still provides a reasonable number of facilities and services though access to a cash point, doctors surgery and amenity area could benefit the Local Centre.

Summary and Conclusions

Overall, the Local Centres remain well served, with most of the indicators listed in the IDP present in most of the Local Centres as shown in Figure 15.

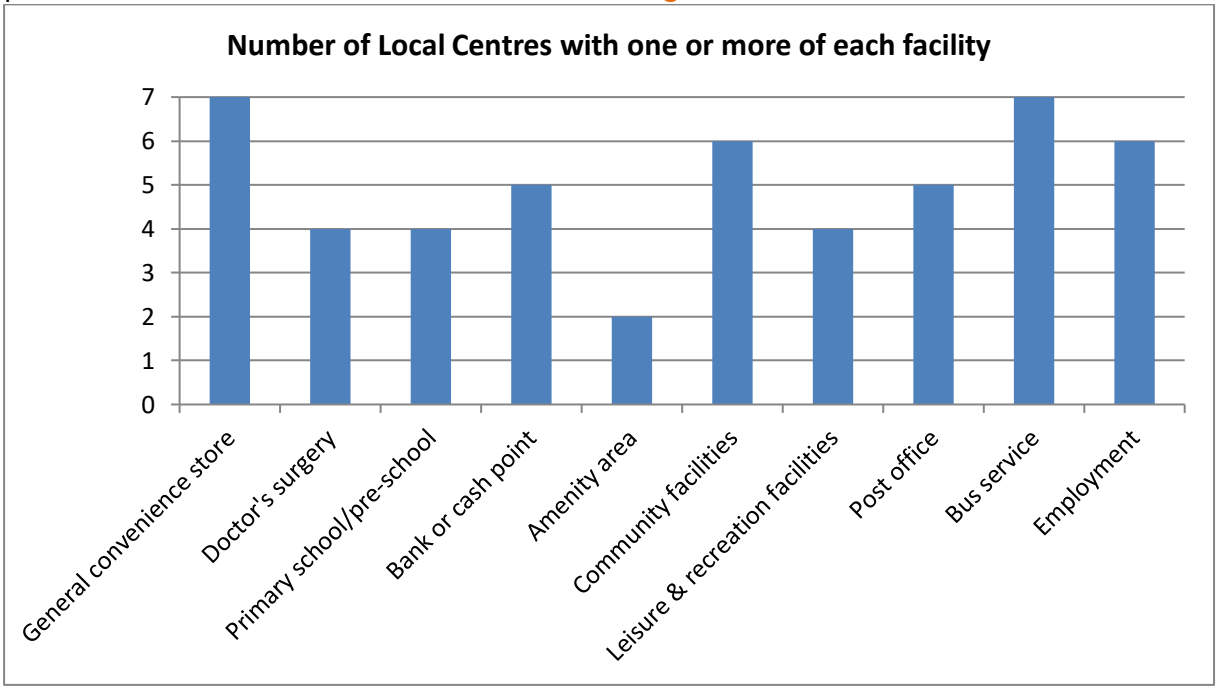


Figure 15: Number of Local Centres with one or more of each sustainability indicator

It is also important to consider the Local Centres not just on these indicators, but also in context. For example, only two of the Local Centres have amenity areas, but in some cases considerable amenity space lies just outside the Local Centre boundary (for example the beach in the case of coastal Local Centres). Similarly, in the case of Cobo and Forest, schools lie within a short distance of the Local Centre boundaries.

Pedestrian and bicycle infrastructure improvements could be made within all of the Local Centres.

Accessibility is important in terms of the IDP objectives in relation to infrastructure and inclusivity, as well as the wider States objectives relating to health and wellbeing.

The policies in the IDP place significant emphasis on the individual character, setting and scale of the Local Centres when considering development proposals, and the annual survey contributes to evidencing the individual nature of each Local Centre. For example, the largest Local Centre, St Martin, had the greatest range of sustainability indicators as well as other services and facilities and is a different scale to the more rural Local Centre of St Pierre du Bois, which still contains a range of facilities and services that serve the local community but where there are fewer non-residential uses. Forest, for example, has a low residential density and fewer facilities but complements the provision at Forest West.

Table 2 below shows the proportion of non-residential uses relative to the number of dwellings in the Local Centre, to give an idea of how the level of facilities relates to the local community (the number of non-residential units divided by the number of dwellings within

the Local Centre). This is scaled up in the final column of the table to give an approximate number of non-residential units per 100 dwellings simply for the purposes of comparing the figures (whole figures being easier to compare).

Table 2: Proportion of non-residential units relative to the number of dwellings within each Local Centre

Local Centre	Number of dwellings at December 2019	Number of non-residential 'units'* observed during survey	Approximate number of non-residential units per dwelling within Local Centre	Approximate number of non-residential units per 100 dwellings
St Martin	422	79	0.19	19
Cobo	294	30	0.10	10
L'Islet	320	30	0.09	9
Forest West	146	16	0.10	10
St Pierre du Bois	71	21	0.28	28
L'Aumone	112	8	0.06	6
Forest	34	14	0.41	41

*'Units' in this report refers to amenity areas as well as buildings.

The number of units surveyed in each Local Centre has changed in some cases since 2019 which reflect activity in each centre. In L'Aumone shows the number of non-residential uses has increased by one, due to the new spa facility (Floatroom) being identified during this year's survey. St Pierre du Bois also shows an increase by one and this is for the community gardens at the back of the post office car park, which is counted under amenity areas. In contrast, L'Islet has had one comparison retail unit change to residential use and another unit (Tux and Tails) has been added back into the non- residential uses, after it was recognised that the business was still in operation. The number of non-residential units for all other local centres has remained the same since the 2019 survey.

It is important to continue to improve the data we can record, specifically in relation to ground and upper floors where the use of the building is different and where one building is split into different uses, in order to give a better representation of the mix of uses within the Local Centres. This is part of the process of improving our data over time and ensuring that changes are more visible in the data.

Interestingly, St Pierre du Bois and Forest Local Centres have the highest ratio of non-residential to residential units, highlighting that relative to the size of the Local Centre, both have a reasonable number of facilities and services. The relative importance of these non-residential units to the sustainability of the Local Centre may be somewhat different however, for example a general convenience store is considered a critical element, whereas comparison retail is not. However it does suggest the function of the Local Centre, with Forest perhaps serving more passing trade (as a result to the links to the airport, for example and with the 'anchor' of Forest Stores), and St Pierre du Bois potentially serving a wider rural area, given its greater distance to a Main Centre and its high proportion of public amenity uses.

Since 2018, industry, storage and distribution has more than doubled within the Cobo Local Centre, and whilst this continues to slightly increase this year, this does not raise any great concerns for the mix of uses, as this increase comes from a previously vacant industry storage and distribution unit and as such does not represent a new area of industrial use. However, this will continue to be monitored.

The number of vacancies in each of the Local Centres was observed during the survey. In terms of vacancies observed for 2020, all Local Centres vacancies have either remained the same (Forest West) or have decreased in the number of vacancies, which is a promising sign for the vitality of the Local Centres. As such, there have been no increases in the number of vacancies observed since the 2019 survey. Last year, , St Martin Local Centre experienced a doubling of vacancies recorded, however this year it has decreased in the number of vacancies from 8% (2019) to 5% (2020). This has meant that both St Martin's and L'Islet now have the highest number of vacancies. Forest West and L'Aumone have no vacancies recorded. . The St Martin's Hotel site remains a significant vacancy within the St Martin's Local Centre, given the size of the site and another notable vacancy which remains in St Pierre du Bois is the former Natwest Bank. It will be important to closely monitor vacancies going forward, to ensure the range remains proportionate to the community it serves.

Overall each of the Local Centres continue to be sustainable and to provide vital services and facilities to the community and each retains at least one convenience store which is considered critical for a Local Centre. Whilst each unique Centre has opportunities to improve, none appear to show significant signs of decline and the number of indicators present in each Local Centre appears proportionate to its size, location and function.

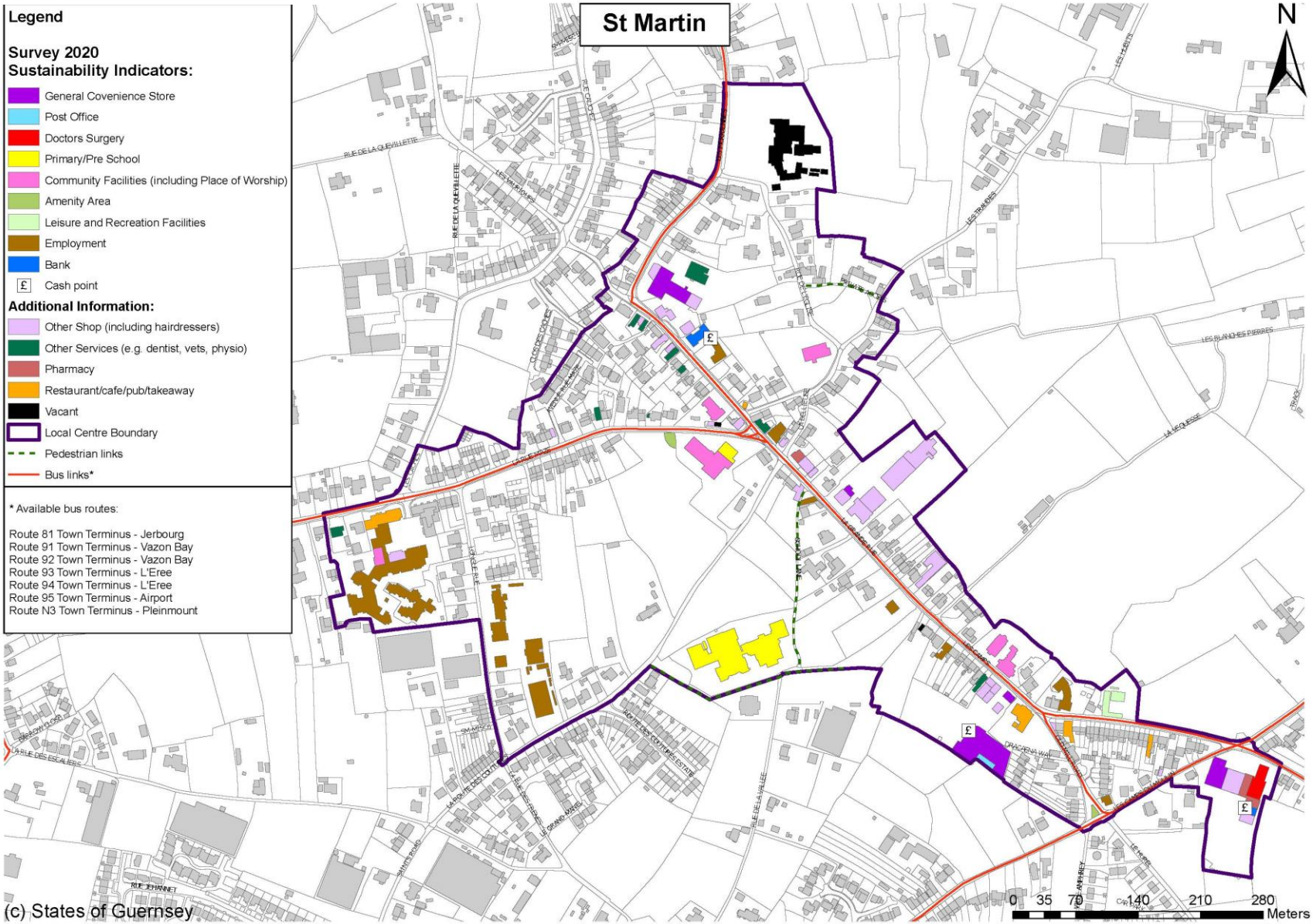
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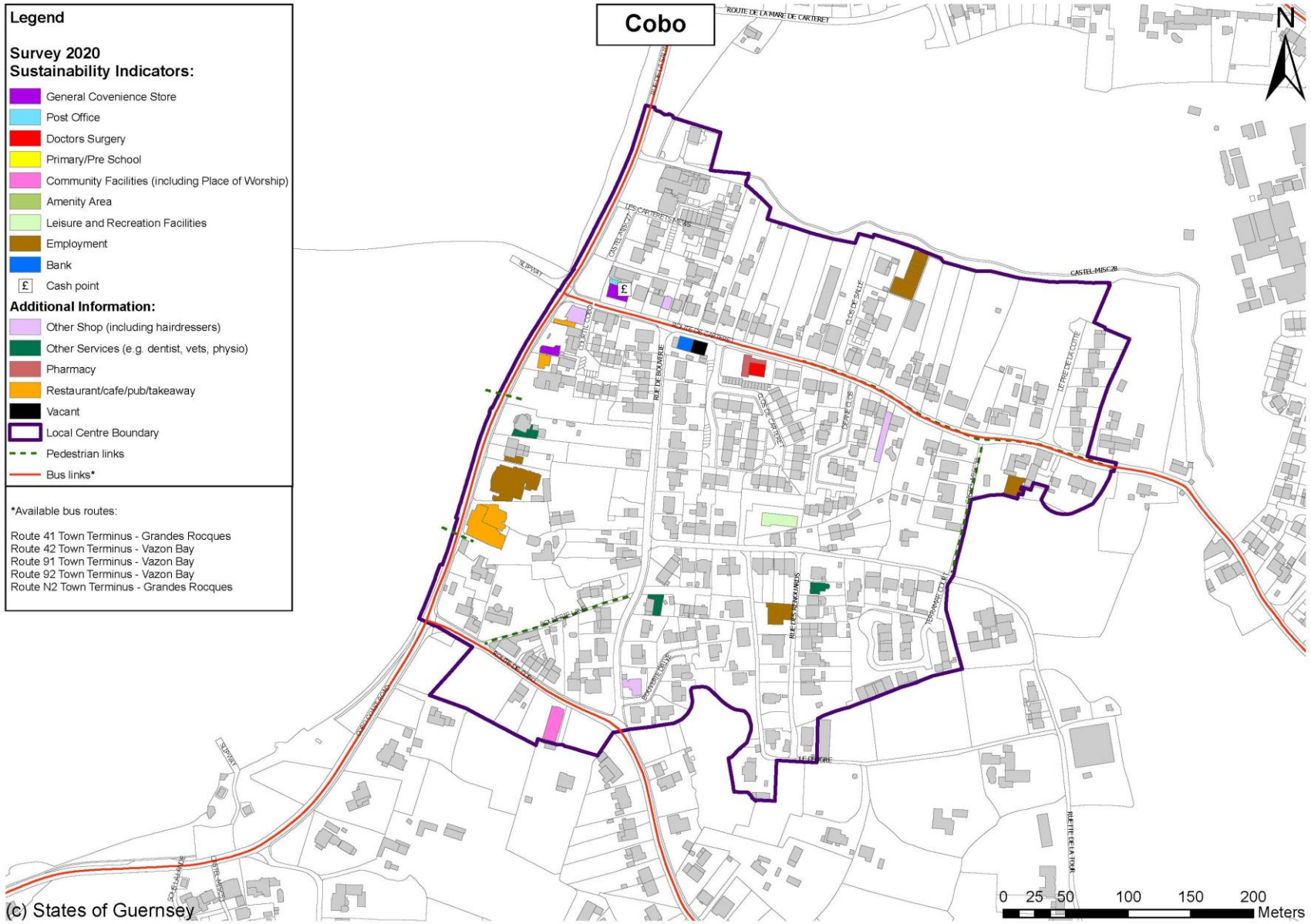
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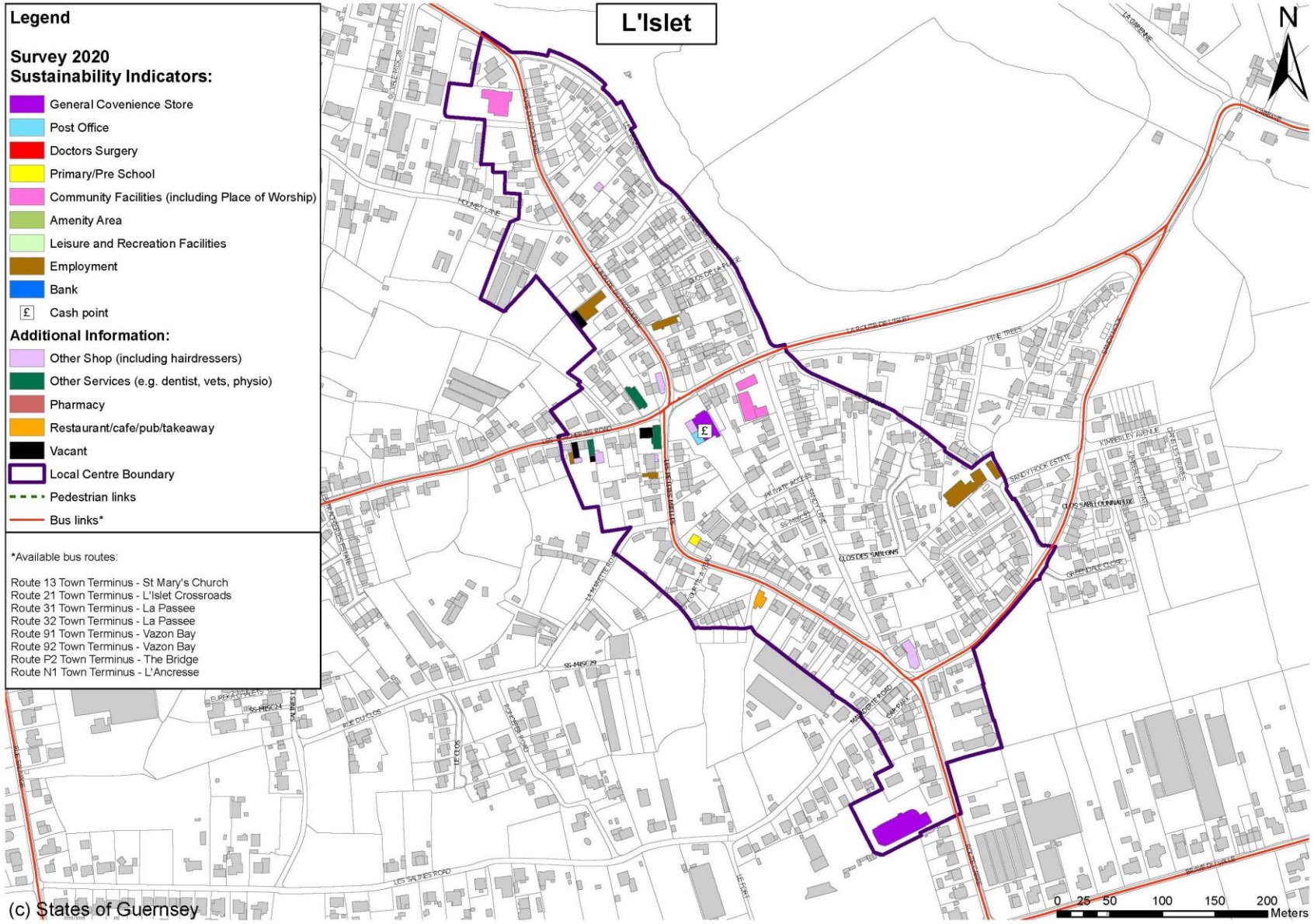
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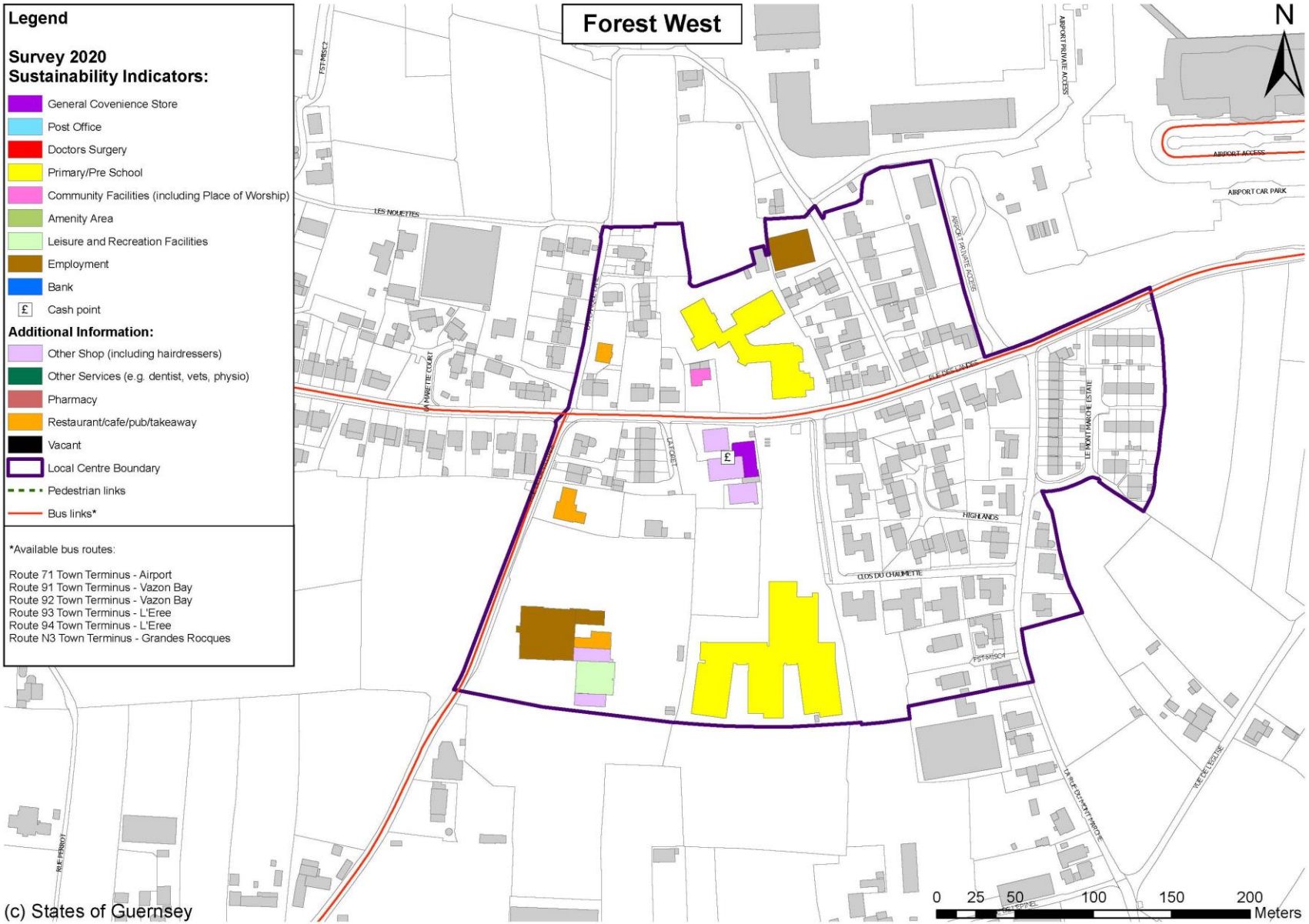
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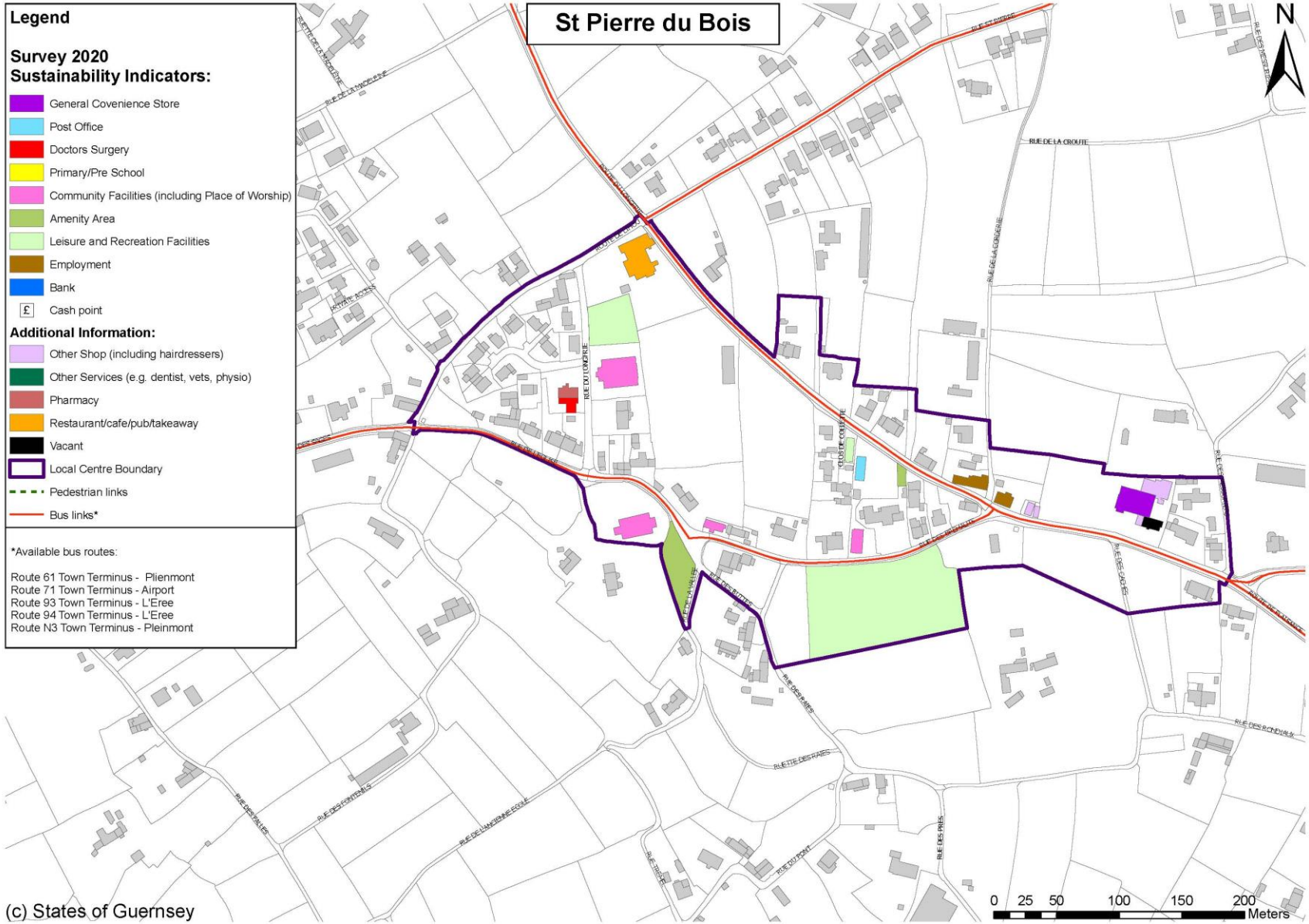
Appendix 1 Local Centre maps

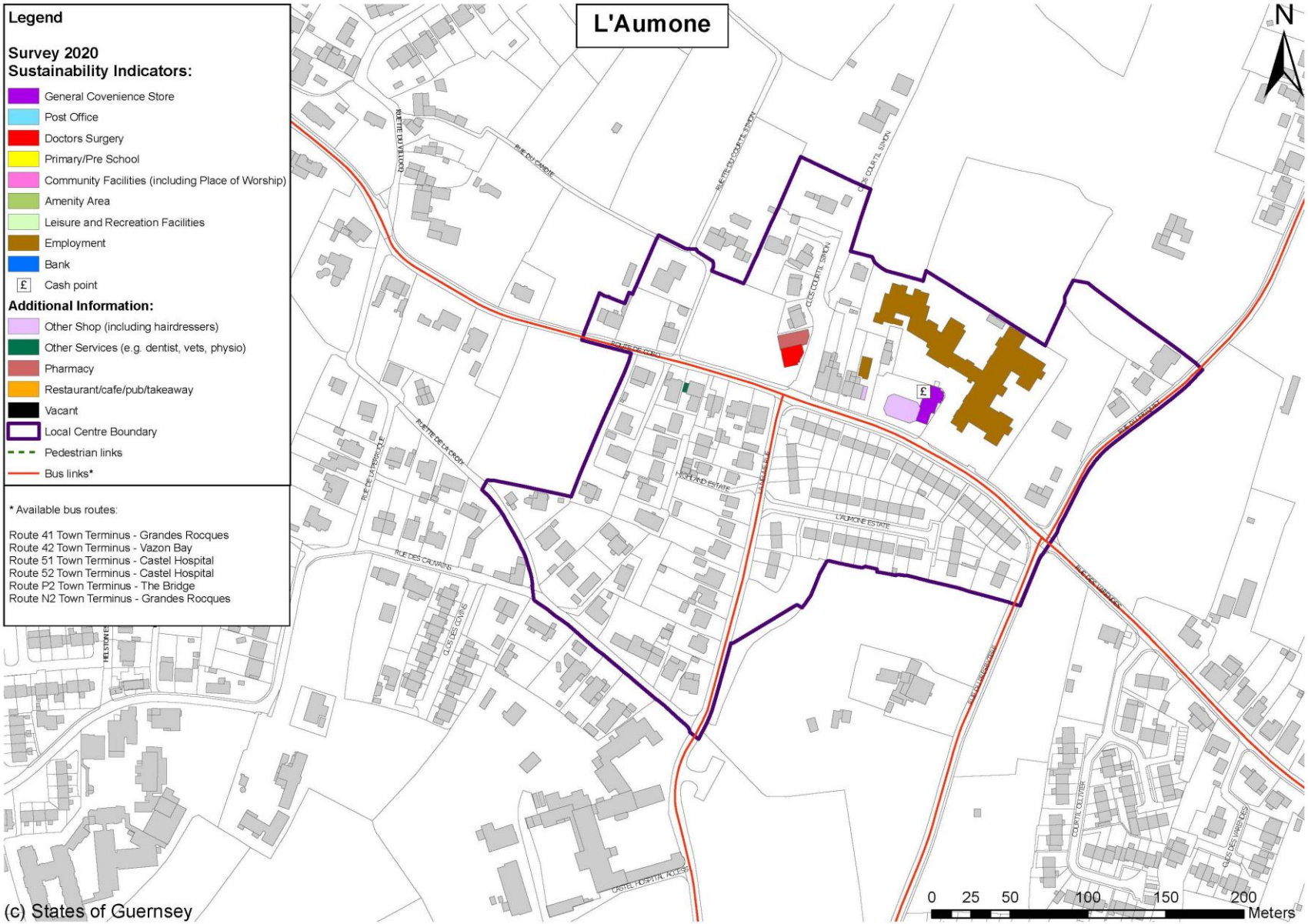


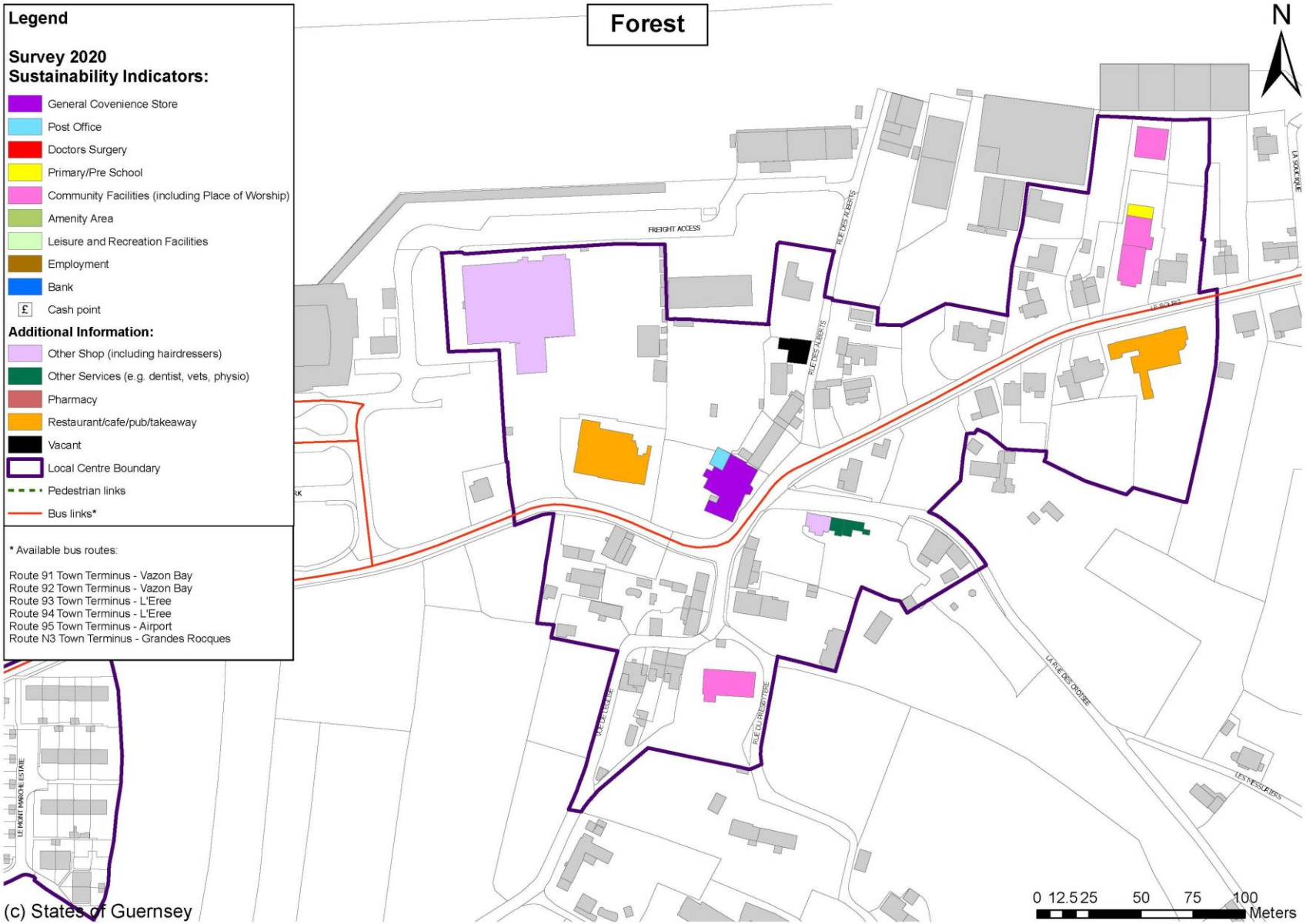

Cobo
Legend
Survey 2020
Sustainability Indicators:
General Covenience Store
Post Office
Doctors Surgery
Primary/Pre School
Community Facilities (including Place of Worship)
Amenity Area
Leisure and Recreation Facilities
Employment
Bank
£ Cash point
Additional Information:
Other Shop (including hairdressers)
Other Services (e.g. dentist, vets, physio)
Pharmacy
Restaurant/cafe/pub/takeaway
Vacant
Local Centre Boundary
Pedestrian links
Bus links*
*Available bus routes:
Route 41 Town Terminus - Grandes Rocques
Route 42 Town Terminus - Vazon Bay
Route 91 Town Terminus - Vazon Bay
Route 92 Town Terminus - Vazon Bay
Route N2 Town Terminus - Grandes Rocques
ROUTE DE LA MARE DE CARTERET
CASTEL MISC 28
ROUTE DE CARTERET
RUE DE BOUVERIE
CLOS DE SALLE
LE PRE DE LA COTE
LE CLOS DU COBO
CLOS DE LA FERTE
RUE DES SENOUMES
DESMARS CLOSE
LE CLOS DU MANOIR
LE CLOS DU MANOIR
LE CLOS DU MANOIR


L'Islet
N
Legend
Survey 2020
Sustainability Indicators:
General Covenience Store
Post Office
Doctors Surgery
Primary/Pre School
Community Facilities (including Place of Worship)
Amenity Area
Leisure and Recreation Facilities
Employment
Bank
£ Cash point
Additional Information:
Other Shop (including hairdressers)
Other Services (e.g. dentist, vets, physio)
Pharmacy
Restaurant/cafe/pub/takeaway
Vacant
Local Centre Boundary
Pedestrian links
Bus links*
*Available bus routes:
Route 13 Town Terminus - St Mary's Church
Route 21 Town Terminus - L'Islet Crossroads
Route 31 Town Terminus - La Passee
Route 32 Town Terminus - La Passee
Route 91 Town Terminus - Vazon Bay
Route 92 Town Terminus - Vazon Bay
Route P2 Town Terminus - The Bridge
Route N1 Town Terminus - L'Ancresse
(c) States of Guernsey
0 25 50 100 150 200
Meters


Legend
Survey 2020
Sustainability Indicators:
General Covenience Store
Post Office
Doctors Surgery
Primary/Pre School
Community Facilities (including Place of Worship)
Amenity Area
Leisure and Recreation Facilities
Employment
Bank
£ Cash point
Additional Information:
Other Shop (including hairdressers)
Other Services (e.g. dentist, vets, physio)
Pharmacy
Restaurant/cafe/pub/takeaway
Vacant
Local Centre Boundary
Pedestrian links
Bus links*
*Available bus routes:
Route 71 Town Terminus - Airport
Route 91 Town Terminus - Vazon Bay
Route 92 Town Terminus - Vazon Bay
Route 93 Town Terminus - L'Eree
Route 94 Town Terminus - L'Eree
Route N3 Town Terminus - Grandes Rocques
Forest West
N
AIRPORT ACCESS
AIRPORT CAR PARK
AIRPORT PRIVATE ACCESS
LES NOUETTES
LA MARETTE COURT
LE MONT MARCHE ESTATE
HIGHLANDS
CLOS DU CHALMETTE
RUE DE L'EGLISE
RUE PERROT
0 25 50 100 150 200
Meters
(c) States of Guernsey


Legend
Survey 2020
Sustainability Indicators:
General Covenience Store
Post Office
Doctors Surgery
Primary/Pre School
Community Facilities (including Place of Worship)
Amenity Area
Leisure and Recreation Facilities
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Other Services (e.g. dentist, vets, physio)
Pharmacy
Restaurant/cafe/pub/takeaway
Vacant
Local Centre Boundary
Pedestrian links
Bus links*
*Available bus routes:
Route 61 Town Terminus - Plienmont
Route 71 Town Terminus - Airport
Route 93 Town Terminus - L'Eree
Route 94 Town Terminus - L'Eree
Route N3 Town Terminus - Pleinmont
St Pierre du Bois
N
RUE DE LA CROUTE
RUE DE LA CONGERIE
RUE DU TOMBEAU
CLOSTE COUPEE
RUE DES CAGES
RUE DES RAIES
RUE DES FRAIES
RUE DU PONT
RUE DES FONTENELS
RUE DE L'ANCIENNE ECOLE
0 25 50 100 150 200
Meters
(c) States of Guernsey


Legend
Survey 2020
Sustainability Indicators:
General Covenience Store
Post Office
Doctors Surgery
Primary/Pre School
Community Facilities (including Place of Worship)
Amenity Area
Leisure and Recreation Facilities
Employment
Bank
£ Cash point
Additional Information:
Other Shop (including hairdressers)
Other Services (e.g. dentist, vets, physio)
Pharmacy
Restaurant/cafe/pub/takeaway
Vacant
Local Centre Boundary
Pedestrian links
Bus links*
* Available bus routes:
Route 41 Town Terminus - Grandes Rocques
Route 42 Town Terminus - Vazon Bay
Route 51 Town Terminus - Castel Hospital
Route 52 Town Terminus - Castel Hospital
Route P2 Town Terminus - The Bridge
Route N2 Town Terminus - Grandes Rocques
L'Aumone
N
0 25 50 100 150 200
Meters
(c) States of Guernsey


Legend
Survey 2020
Sustainability Indicators:
General Covenience Store
Post Office
Doctors Surgery
Primary/Pre School
Community Facilities (including Place of Worship)
Amenity Area
Leisure and Recreation Facilities
Employment
Bank
£ Cash point
Additional Information:
Other Shop (including hairdressers)
Other Services (e.g. dentist, vets, physio)
Pharmacy
Restaurant/cafe/pub/takeaway
Vacant
Local Centre Boundary
Pedestrian links
Bus links*
* Available bus routes:
Route 91 Town Terminus - Vazon Bay
Route 92 Town Terminus - Vazon Bay
Route 93 Town Terminus - L'Eree
Route 94 Town Terminus - L'Eree
Route 95 Town Terminus - Airport
Route N3 Town Terminus - Grandes Rocques
Forest
N
FREIGHT ACCESS
RUE DES ARBRES
LA SOUCRIQUE
LE MONT MARCHE ESTATE
LES RESSURTIERS
0 12.5 25 50 75 100
Meters
(c) States of Guernsey

Appendix 2: Corrected baseline statistics

The table below shows the corrected baseline statistics for Cobo, Forest and Forest West Local Centre. After further investigation, it became apparent that the site areas for the below Local Centres were incorrect and as such the figures have been restated for the years 2017, 2018 and 2019. These figures replace the previous baseline statistics included within the published Local Centre survey reports.

The site areas have been amended and as such the approximate residential density (dwellings per hectare) has been recalculated below. The residential density is worked out by dividing the number of dwellings by the total land area.

Local Centre	Size of Centre	Number of dwellings			Approximate residential density (dwellings per hectare)		
		Dec 2017	Dec 2018	Dec 2019	2017	2018	2019
Cobo	17.7 Ha (109v)	295	294	294	16.7	16.6	16.6
Forest West	10.7ha (65v)	146	146	146	13.6	13.6	13.6
Forest	5.8ha (35v)	34	34	34	5.9	5.9	5.9