Main Centres Survey 2017

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Main Centres Survey 2017

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Introduction

This document is a report on the two Main Centres in Guernsey; St Peter Port (Town) and St Sampson/Vale (the Bridge). It is informed by research and surveys undertaken in 2017, the main purpose of which is to establish a baseline of information and evidence against which to assess change and trends over time. This forms part of the monitoring of planning policies relating to Main Centres, which are set out in the Island Development Plan 2016 (IDP).

The IDP was adopted by the States in November 2016, and as part of the plan process, all policies are monitored in order to assess their effectiveness in delivering both the Plan Objectives and the strategic objectives of the Strategic Land Use Plan, 2011 (SLUP)[1], as well as the priorities of the States as set out in the Policy and Resources Plan 2017.

This is the first report on the Main Centres following the adoption of the IDP and, therefore, the information contained within this document acts primarily as a baseline of evidence and does not provide analysis of trends over time. However, the data collected has informed the Annual Monitoring Report 2017 and the intention is that future trends and significant findings will be reported in subsequent Annual Monitoring Reports. The full survey data will continue to be reported separately in the annual Main Centres Survey.

Prior to the adoption of the IDP, a retail audit was carried out in both Town and the Bridge annually since 2009, with the intention of enabling assessment of the health and vitality of these areas and identifying any trends, for example in grouping of uses or in the amount of vacant sites. The Town and Bridge Audit was undertaken within the Core Retail Zones of the Central Areas as defined in the former development plan, the Urban Area Plan, which differ to the policy designations in the IDP.

Because of the different survey areas, this historic data is not directly comparable to the information now gathered. However, from 2009 to 2016 no significant trends were identified, although there have been annual variations in the number of vacancies, for example. Overall, vacancies have remained low and building condition generally good within both Town and the Bridge over this period.

Whilst there have been no significant general trends over this time, there have been several important redevelopments, for example the Gabriels retail units on Fountain Street have been refurbished, and the Havelet Brewery site redeveloped as residential units. The closure of the retail outlet 'Quayside' at the Bridge was also of significance.

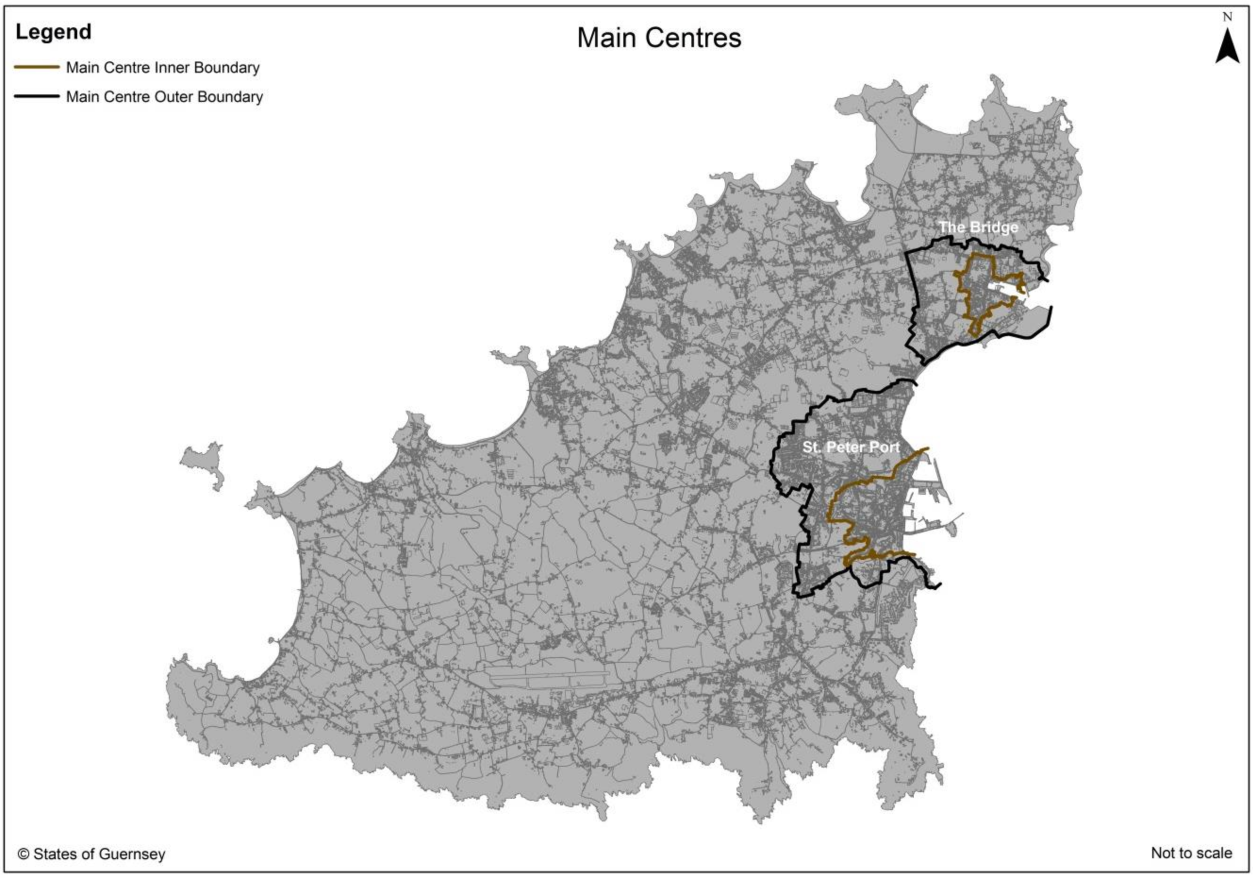
Drawing on the experience of these annual retail audits, the Main Centres Survey intends to capture the retail audit and building condition data, as well as reporting on public realm, accessibility and other relevant issues that relate to Main Centre policies.

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

Policy Context
The spatial strategy of the SLUP is to concentrate development within and around the edges of the urban centres of St Peter Port and St Sampson/Vale. As such, Town and the Bridge are to be maintained as the island's main economic centres and as attractive places to live, work and spend leisure time. The SLUP policies focus on enhancing vitality and viability of Town and the Bridge by encouraging a wide range of retail, commercial, leisure, business, culture and arts facilities, as well as residential uses. It sets out that the scale of provision within each Main Centre should be such that Town is maintained as the Island's primary retail centre.

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

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



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

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

The IDP states that the concept of 'vitality and viability' is central to maintaining and enhancing town centres. This concept is dependent on many factors, including the range and quality of activities in a centre, mix of uses, accessibility to people living and working in the area, and general amenity, appearance and safety. Generally speaking, vitality is considered to be a measure of how busy a centre is, whereas viability is a measure of its capacity to attract ongoing investment, its importance, and the ability to adapt to changing needs.

Both vitality and viability will depend on factors such as:

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

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

Main Centre Policy Designations

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

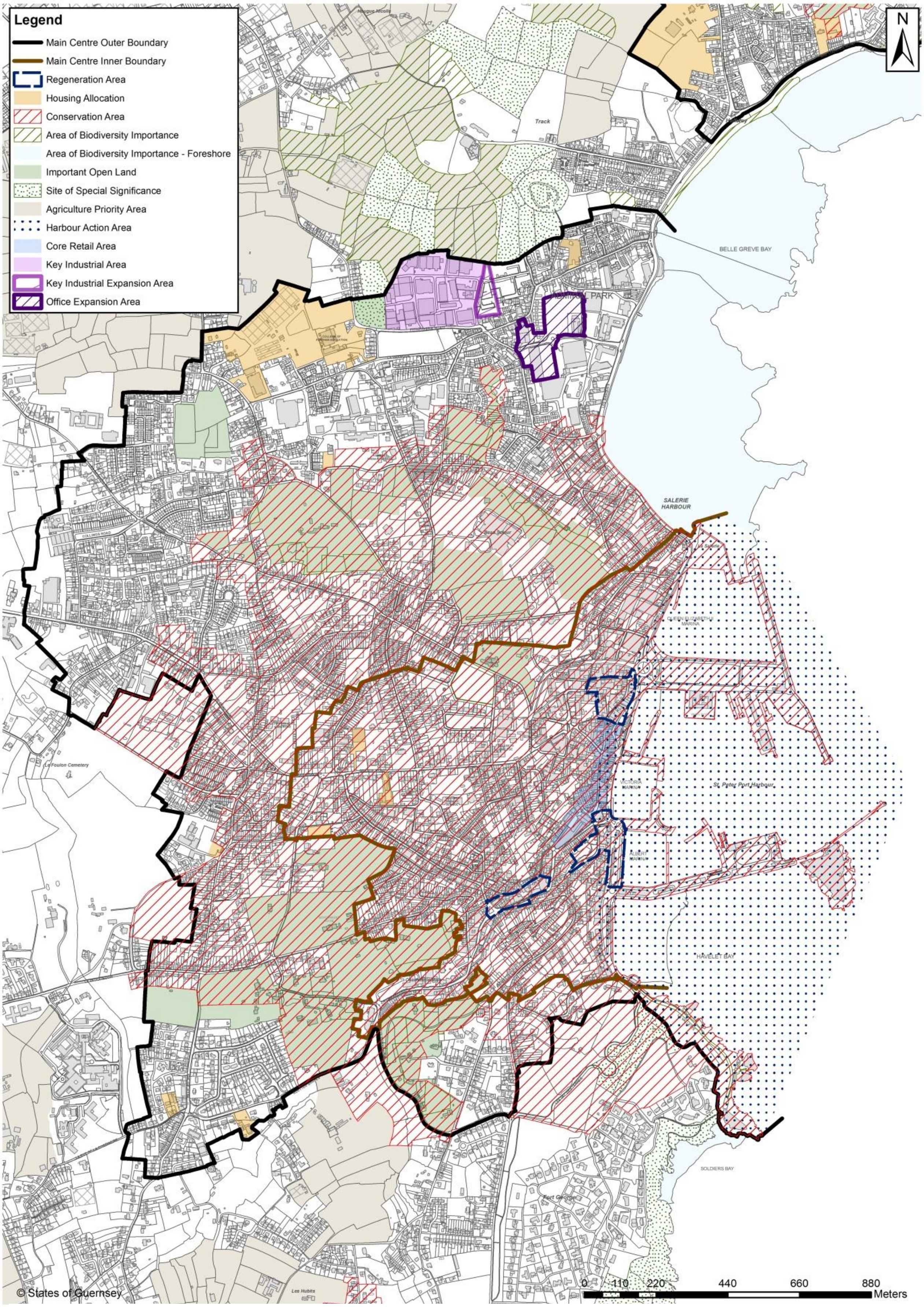
- In the **Main Centre Outer Areas**, a range of new development will be supported where it would not detract from the objective of ensuring the Main Centres remain the core focus for economic and social growth. Policies allow for new convenience retail (and limited works to existing comparison retail outlets) to ensure that the Main Centre Inner Areas remain the core focus for economic and social growth as directed by the SLUP. These areas are predominantly residential, although the Key Industrial Areas also fall within the Main Centre Outer Areas.
- The **Main Centre Inner Areas** are mixed use areas but they do not have the retail focus of the Core Retail Areas (see below), or need a comprehensive approach to development as in the Regeneration Areas or Harbour Action Areas. Outside of the Core Retail Areas policies provide flexibility to change away from retail use where it supports the objective of ensuring the Main Centres remain attractive focal points for economic and social activity.

- **Core Retail Areas**, where planning policy favours the retention of retail uses and the addition of new shops. On upper floors, change of use away from retail is generally supported where the proposed new use would contribute to the vitality and viability of the Core Retail Area.
- The **Regeneration Areas** present opportunities for new sustainable place making, attracting inward investment and making improvements to, and enhancement of, the public realm and historic environment.
- **Harbour Action Areas** have been identified where a co-ordinated approach to mixed use development is supported, recognising the potential opportunities for development and securing significant inward investment, as well as improvement of the appearance and accessibility of public places.

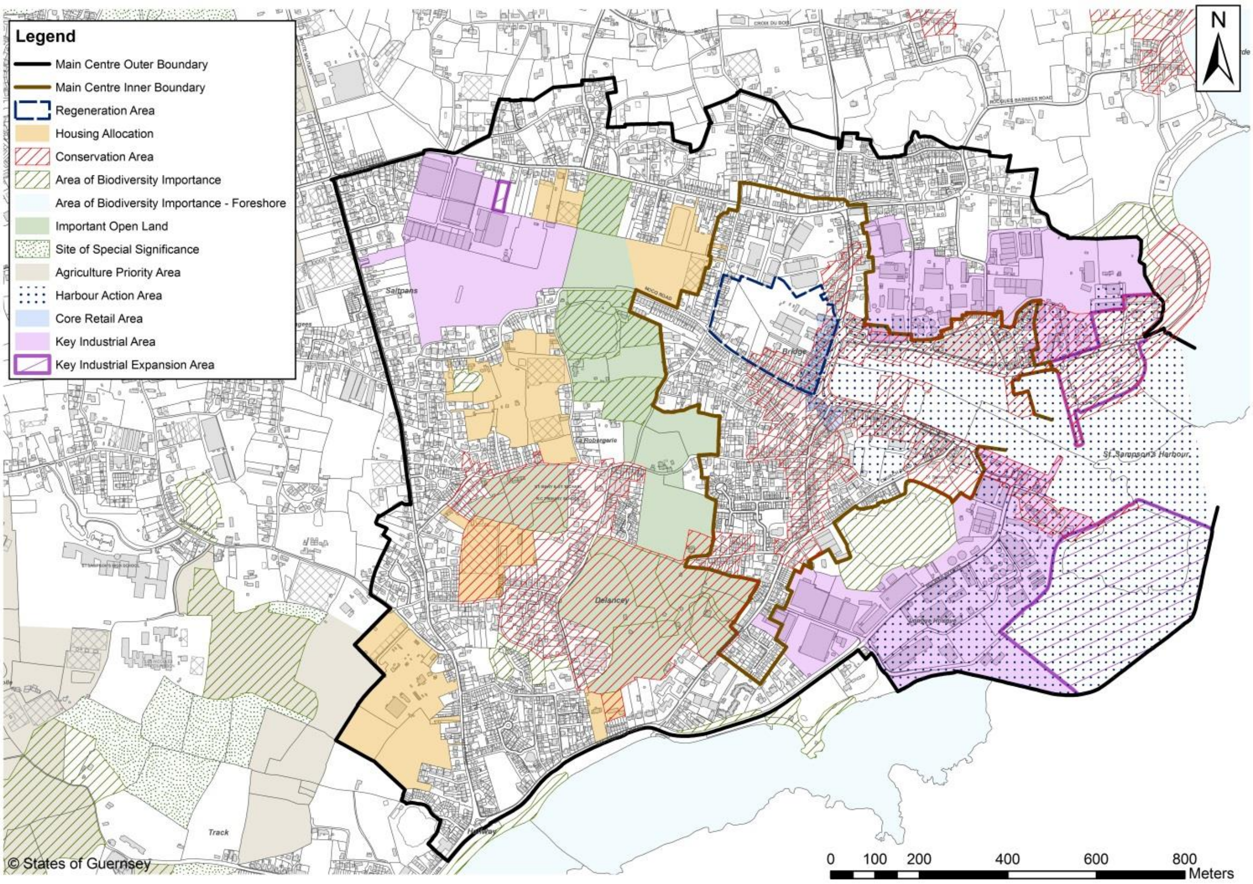
Other policy designations in the Main Centres and Main Centre Outer Areas include Housing Allocations, Key Industrial Areas, Key Industrial Expansion Areas, and the Admiral Park Office Expansion Area. These designations have a different policy focus and are monitored separately, and are not specifically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

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

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



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



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

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

Aims and Methodology

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

Methods used for this report are set out in full in Appendix 1: Research tools and techniques, which describes the techniques used and illustrates which were applied to each policy designation. As described above, the primary purpose of the research is to provide evidence against which the effectiveness of planning policy can be monitored. Therefore, a brief ‘policy relevance’ is noted against each of the techniques for clarity of purpose. These research techniques can be summarised as follows:

- Use survey
- Goad categorisation
- Building condition survey
- Opening hours
- Façade activation
- Place inventory
- Footfall counts
- Interviews with stakeholders
- Plotting data in GIS (Geographical Information Systems)

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

The breakdown of uses presented in this report is by number of units rather than the number of occupiers (for example some occupiers may take up more than one unit, such as Beghins shoe shop in Town). This better represents the character of Guernsey’s high street which is largely made up of smaller floorplate units.

Regarding interviews, the data collected was from a proportionately small sample and a cautious approach has therefore been taken around the interpretation of data. For the purposes of this report the interviews conducted provided insights which helped inform the methodology and set out the type of data to be collected for this report. 14 in-depth interviews were held with different stakeholders, including the Town Centre Partnership, Vale Douzaine and members of the public.

Other sources of information include ‘A Retail Strategy for Guernsey’, published in December 2013 and approved by the former Commerce and Employment Department of the States of Guernsey, which took into account a wide range of evidence and information (including the Strategic Land Use Plan, 2011, and the Roger Tym & Partners Retail Study, 2010). This Strategy informed the development of retail policy within the Island Development Plan.

To provide some additional context, relevant findings of a survey published in November 2017, which was carried out by Island Global Research and commissioned to inform the Committee for Economic Developments’ consideration of retail policy, are reported. This used an online survey which ran for two weeks and which was completed by 934 residents.

Main Centre Findings

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

St Peter Port (Town)

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

The 2013 Retail Strategy found that overall Town is a very pleasant place to shop and one that remains a popular place for islanders and visitors to spend time. The Strategy states that the heritage and sense of history in Town contributes to the view that Town is not just like another town centre in the UK, which "are often seen as being without character."

The 2017 Retail Survey found that Town is the main shopping destination for the Island, though customers would like to see improvements which enhance the leisurely shopping 'experience'.

During interviews undertaken as part of this Main Centres Survey, stakeholders consistently referred to the picturesque nature of Town, noting the floral displays, quality of architecture and bunting, for example, reflecting the findings of the 2013 Retail Strategy. Stakeholders also reported that independent shops had a particular appeal, though chain shops are also valued for their contribution to the overall offering without overwhelming or homogenising the high street. In terms of public space, comments often noted there was a lack of places to 'hang out'. This is potentially consistent with the observation in the 2017 Retail Survey that there is not an enticing 'shopping experience'.

These themes and others are explored further in the evidence below.

Town Accessibility

The Town Bus Terminus is located within the South Esplanade Regeneration Area, close to the southern end of the Core Retail Area. As such, there are public transport connections to most parts of the island direct from Town, including several routes that connect Town with The Bridge. The main taxi rank lies within the Lower Pollet Regeneration Area, and the Harbour provides connections to the other islands in the Bailiwick, as well as Jersey, France and the UK. As such, Town remains a hub for transport connections albeit that there is no centralised transport hub within Town which accommodates all transport options.

In future it is intended to map pedestrian and cycle routes around town, as well as cycle parking which, coupled with more robust and extensive footfall data, could help to give a better overall picture of accessibility and connectivity within and around St Peter Port. The footfall data collected in 2017 is described in the relevant sections below, however the general indication from the data is that, in all areas, footfall was highest during the counts undertaken between 12pm and 2.30pm, compared to the morning and late afternoon counts. Footfall was generally higher during the week than during the Saturday counts.

Accessibility can be difficult in the cobbled areas of Town and in its historic core, particularly for people with physical impairments or those with young children in pushchairs. Parking remains an issue for some, with comments in the 2017 Retail Survey that it is difficult to park for longer than 2 hours, which could be impacting on potential dwell time. The 2013 Retail Strategy considered that the number of short-term parking spaces at that time was “about right” at that time. However the Strategy did note that parking provision could become an issue in the future. Another issue related to the use of the car, however, is the observation of the dominance of traffic along the seafront which divorces the harbour area from the rest of Town.

Respondents to the 2017 Retail Survey suggested an increase in pedestrianised areas, which is consistent with the SLUP and IDP emphasis on improving public realm as a measure to enhance vitality and viability. Improved pedestrian and cycle links with the seafront, including preserving and enhancing the vennelles, would also appear to be welcomed and was explored in the Vision. The Harbour Action Areas and Regeneration Areas include opportunities to improve connectivity and accessibility and to address issues concerning parking.

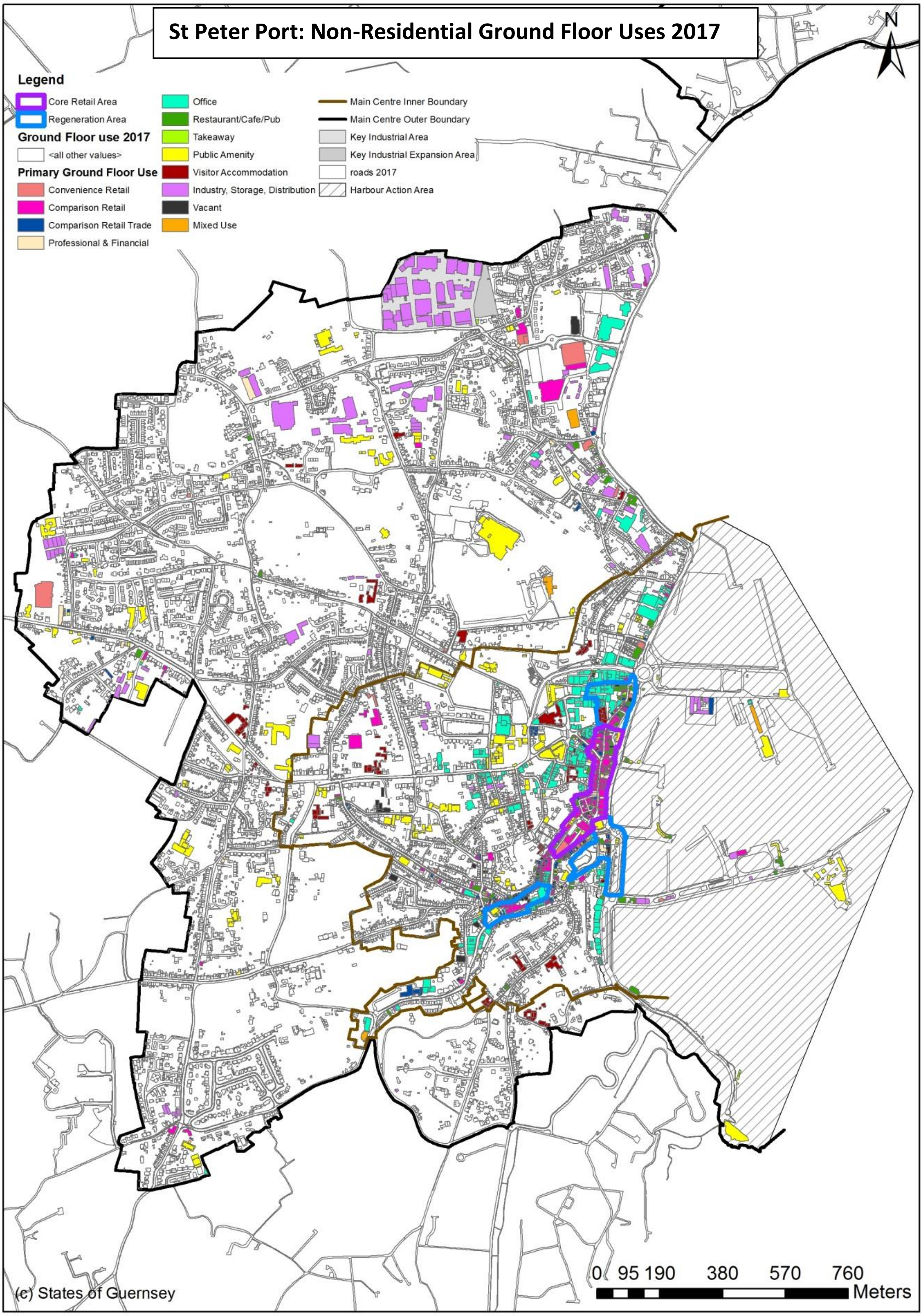
Town Main Centre Inner and Main Centre Outer Areas

For the Main Centre Inner and Main Centre Outer Areas, a desk-top survey was carried out to identify buildings in non-residential use, and these buildings were subsequently surveyed on site to check their use and occupier. Map 4 below shows the spatial distribution of non-residential buildings at ground floor within the St Peter Port Main Centre, including the Main Centre Inner Area, Main Centre Outer Area, Core Retail Area and Regeneration Areas. Also shown are the Key Industrial Area and Key Industrial Expansion Area. *Please note that Map 4 is intended to provide an overall impression of the spatial distribution of non-residential uses but more detailed maps follow later in this report.*

The Main Centre Outer Area is predominantly residential, with clusters of non-residential uses. These include the industrial uses around (and including) the Pitronnerie Road Key Industrial Area, and the retail and office uses at Admiral Park, as well as Guernsey Post, the Old Tobacco Factory, and the Guernsey College of Further Education all in the northern part of the Main Centre Outer Area. There is also a variety of non-residential uses on the Inter-Harbour Route extending north out of St Peter Port towards the Bridge, emphasising the importance of this route for non-residential uses and businesses.

Visitor accommodation is mostly focused in and around the Main Centre Inner Area. Public Amenity uses (such as schools, doctors and museums) are also focused in this area but with additional locations on the periphery of the Main Centre Outer Area.

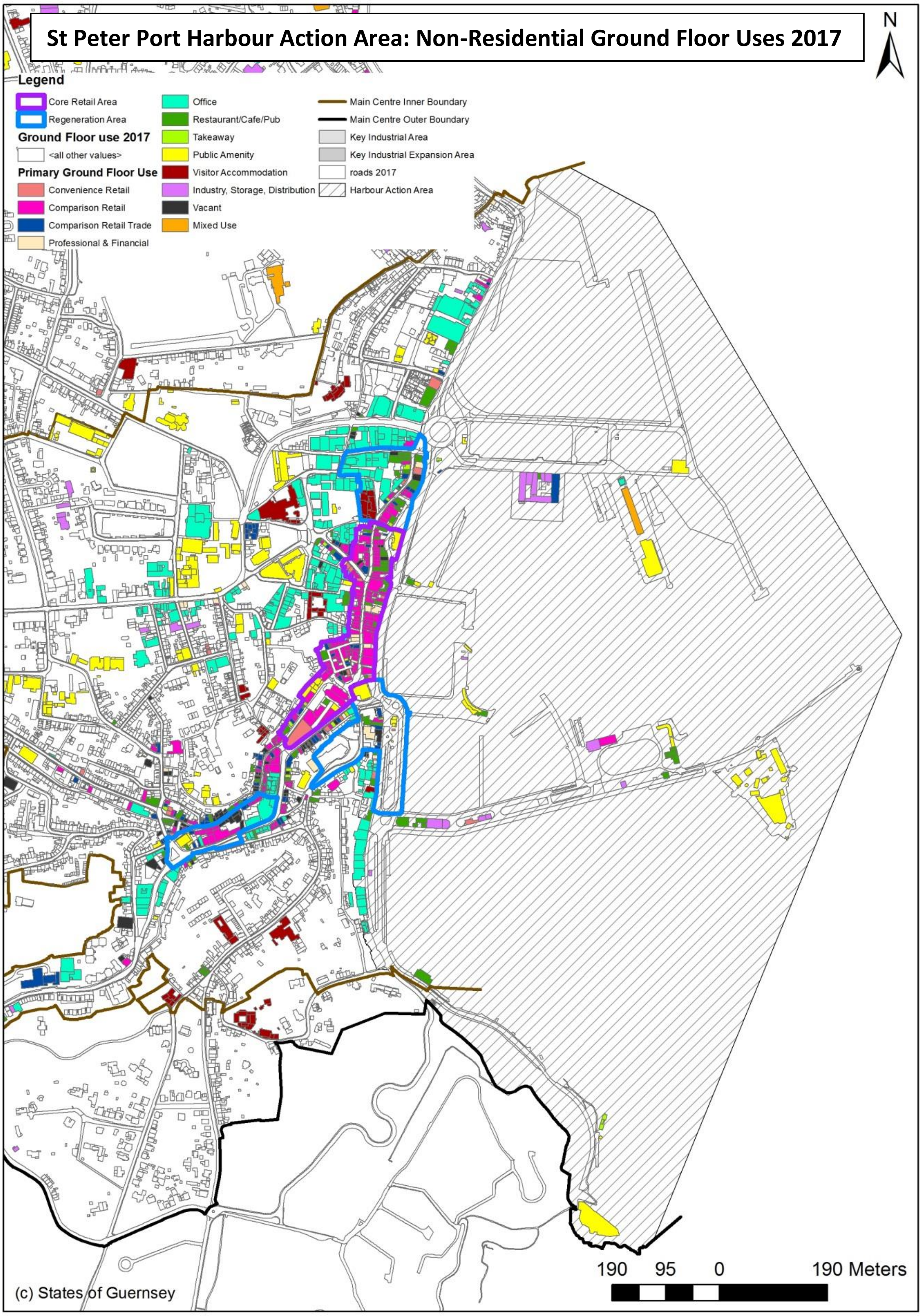
Map 4 shows quite clearly that non-residential uses (shown in colour) are concentrated around the Core Retail Area, with offices lining the main routes into Town towards the Core Retail Area (for example La Charroterie, Rue de Pre, South Esplanade, The Grange and St Julian’s Avenue). A variety of non-residential uses also line the piers within the Harbour Action Area (within the Main Centre Inner Area).



Map 4: Non-residential ground floor uses in St Peter Port Main Centre 2017

St Peter Port Harbour Action Area

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



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

The non-residential uses within St Peter Port Harbour Action Area are diverse, reflecting the many functions of the Town and harbour. Facing the seafront (and also included within the Core Retail Area), along The Quay and North Plantation are a varierty of shops, cafes, restaurants and bars. Similarly, where there is overlap with the Lower Pollet Regeneration Area, there are a mix of uses with restaurants, cafes and pubs, for example on North Plantation and the Lower Pollet, taking advantage of the views out across the Islands. Towards the south of the Harbour Action Area where there is overlap with the South Esplanade Regeneration Area, there are a range of uses including comparison and convenience retail and public amenity uses (including toilets and bus information kiosk). Town Church also falls within the Harbour Action Area designation.

Extending further south, there are several pubs, cafes and restaurants on South Esplanade, whilst office use dominates Les Echelons. There are also a number of non-residential uses along La Vallette including restaurant, kiosk, bathing pools, museum and aquarium.

Castle Emplacement has a variety of uses, many of which are recreation based, and also include the recently redeveloped Slaughterhouse bar and restaurant, the model yacht pond and Castle Cornet, as well as some retail, storage (predominantly boat storage and associated paraphernalia) and places to eat and drink, including the Guernsey Yacht Club. It also provides the main access for the Islands fishing fleet and workshops. Cruise Liner passengers arrive at Albert Pier, and there are associated facilities located there, including the Petit Train and ticket kiosk. There is also a restaurant on Albert Pier and marina facilities for visiting boats. The predominant use of Albert Pier, however, it is for short stay parking, although it is also used for recreation and leisure based activities on holidays and special occasions.

Victoria Pier is again dominated by car parking but also includes a restaurant, marina facilities, public toilets, access to Marina and Swan pontoons, and is used as recreational space on holidays and special occasions.

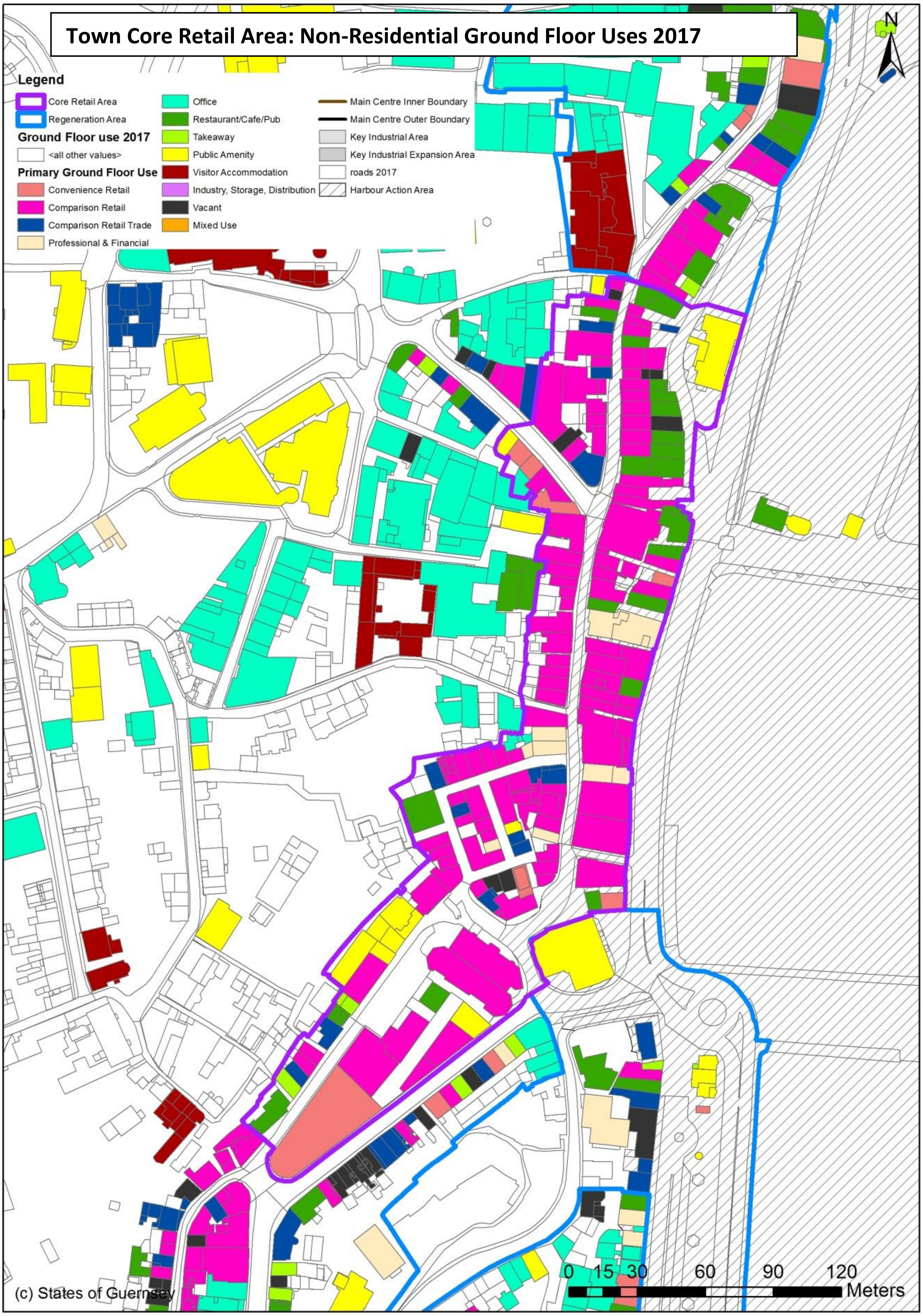
There are a variety of uses at North Beach, including car parking, ticket offices, café, ferry terminal, customs buildings, port related offices and workshops. It is also used for one-off leisure events. This is reflective of the many functions of the harbour. A challenge of the Harbour Action Area will be to provide for the operational and functional requirements of the port whilst encouraging appropriate development and inward investment, and balancing this with conserving and enhancing the harbour’s historic character, and make the most of the harbour as an asset both to Town and island-wide.

As well as incorporating the main port in the island, much of the public parking in Town and also the Bus Terminus are located in the St Peter Port Harbour Action Area, highlighting the importance of traffic and transport to the designation both on land and sea.

Town Core Retail Area

The Town Core Retail Area represents the primary shopping area of Guernsey and the IDP policies seek to focus the area's retail function at ground floor level. The Area is largely pedestrianised (noted as positive in the 2013 Retail Strategy) which creates a pleasant and safe environment for shopping, encouraging dwell time and prioritising the shopper over the car.

Map 6 below shows the extent of the Core Retail Area designation, outlined in purple, and shows the ground floor uses recorded during the 2017 survey.



Map 6: Town Core Retail Area Ground Floor Uses 2017

Map 6 shows the distribution of uses within the Town Core Retail Area and how it relates to the adjacent areas. It is clearly dominated by retail uses, with supporting uses such as banks and places to eat and drink. There is a particular concentration of restaurants, cafes and pubs around North Plantation, on the periphery of the Core Retail Area. The Guille-Allez Library and the Tourist Information Centre are the two main public amenity uses within the Core Retail Area, again on the edges of the designation. Please note that the colours in the figures below do not correspond with the colours used in the maps, though the categories are consistent.

Figure 1 below shows the breakdown of uses by unit in the Town Core Retail Area on the ground floor observed during the 2017 survey by percentage.

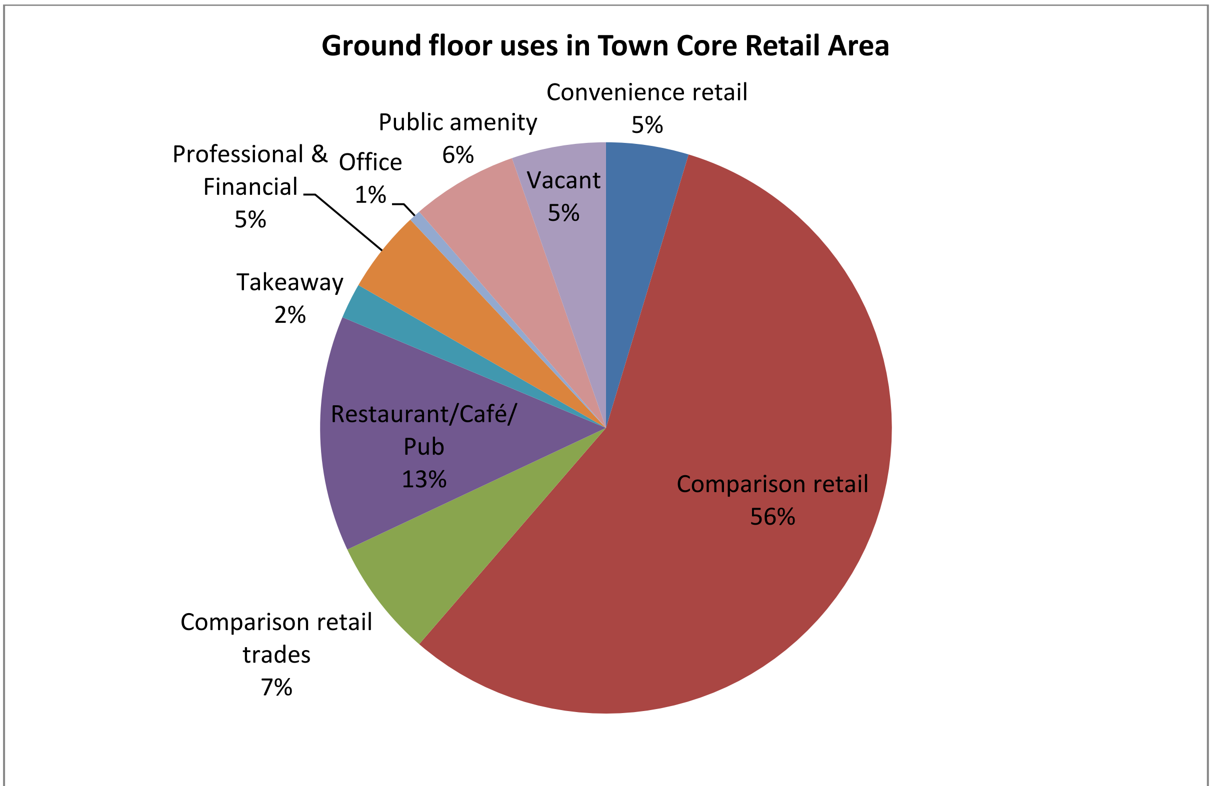


Figure 1: Percentage of ground floor units in each use within the Town Core Retail Area

The retail function, including retail trades such as hairdressers and cobblers, accounts for 68% of the units in the Town Core Retail Area. The number of vacancies was low, amounting to 5% in total.

These are positive results, showing that the Core Retail Area remains predominantly in retail use with complementary uses such as banks (Professional & Financial) and places to eat and drink (Restaurant/Café/Pub) supporting but not overwhelming that primary function.

In terms of uses on the upper floors of the Core Retail Area (where IDP policy offers more flexibility) the information collected on site has been complemented by desk-based research, referring to, for example, TRP records and planning application history. Based on this range of data, the use of upper floors in the Core Retail Area is shown by use type in Figure 2 below where the use is known (it has not been possible to ascertain the use of every upper floor unit, but it is anticipated that the data will be refined and improved over time). Often the upper floor use is complementary to the ground floor, so for example there is a significant proportion of comparison retail on upper floors, which consists of both floor space open to customers but also floor space dedicated to ancillary storage.

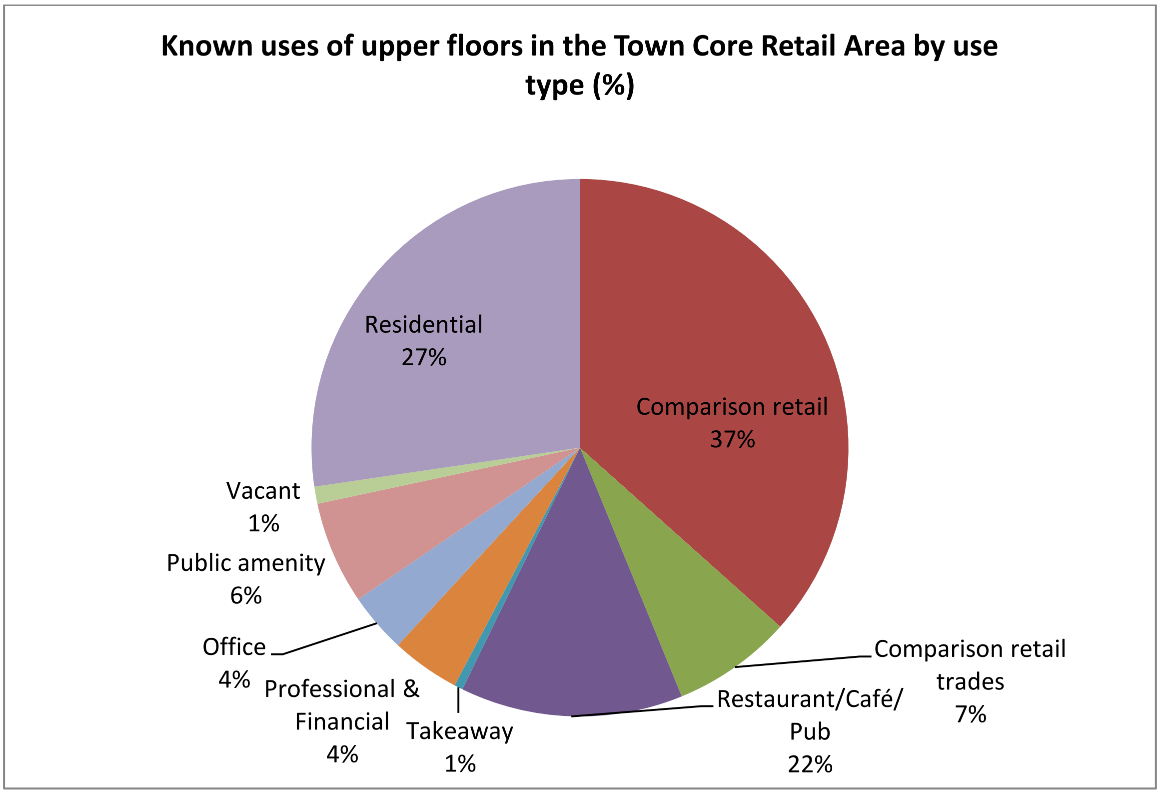


Figure 2: Percentage of upper floor units in different uses within the Town Core Retail Area, where known

The uses on upper floors differ from those at ground floor level, so whereas at ground floor retail accounted for 68% of units, on the upper floors retail accounts for approximately 44%. Instead, there is a greater proportion of Residential use, and also Restaurants/Cafes/Pubs. Again this is consistent with IDP policies where such uses are considered to contribute positively to the vitality and viability of the Core Retail Area and support the retail function.

Of the units in the Core Retail Areas where opening hours are known, including upper floors as well as ground floors, 14.43% are open after 5pm and 11.94% are open on Sundays. These are predominantly restaurants, cafes, pubs and bars which are uses that traditionally support the evening economy. Few shops in the Core Retail Area appear to open on Sundays.

The environmental quality of Town Core Retail Area is kept to a high standard. The findings show that 80% of buildings within the Core Retail Area are in 'good' condition, with 20% in fair condition, contributing to the attractiveness of the high street (see Figure 3 below). This is very positive and indicates that Town continues to be well kept and has a level of investment in its buildings which is an intrinsic part of its picturesque character.

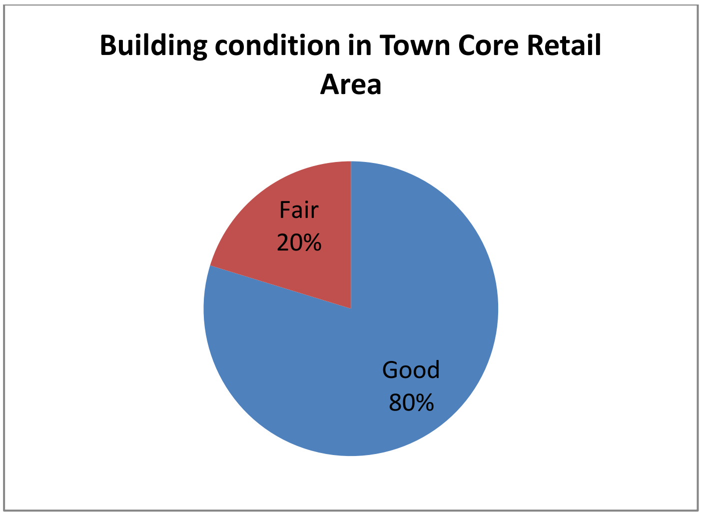


Figure 3: Building condition in Town Core Retail Area

Following the 'on the ground' survey of uses, the Goad categorisation system was used within the Core Retail Areas. In future surveys Goad categorisation will be applied to a greater spatial area so that it can be compared to other Town Centres in the UK and Jersey, for example. Goad categorisation was also used within the Roger Tym Report (2010) into retail in Guernsey.

Goad categories group similar uses whilst also providing a greater level of detail. In turn, this helps build an in depth picture of what makes up Town's Core Retail Area. Not all town centre uses are categorised, only those as shown in the Table 1 below, which includes the percentage of units within the Town Core Retail Area within each Goad class.

Table 1: Goad categorisation of Town Core Retail Area

Use	Goad Category	Percentage
Bakers	G1A	0.00
Butchers	G1B	0.00
Greengrocers & Fishmongers	G1C	0.00
Grocery, Frozen Food & Supermarkets	G1D	1.44
Off Licence and Home Brew	G1E	1.44
Newsagents, Confectioners & Tobacconists	G1F	3.60
Footwear, Cobblers	G2A	3.60
Men’s & Boys wear	G2B	2.16
Women’s , Girls and Children’s Wear	G2C	10.79
Mixed and General Clothing	G2D	12.23
Furniture, Carpets & Textiles	G2E	0.00
Booksellers, arts/crafts, Stationers, Copy Bureaux	G2F	2.16
Electrical, Home Entertainment	G2G	4.32
DIY, Hardware, Household Goods	G2H	0.00
Gifts, China, Glass and Leather Goods	G2I	7.91
Motor Accessories, Car, Motorbike or Boat Sales	G2J	0.00
Pharmacy, Toiletries, Opticians	G2K	7.19
Department, Variety and Catalogue Stores	G2L	4.32
Florists	G2M	0.00
Sports, Toys, Cycles & Hobbies	G2N	2.88
Jewellers, Clocks & Repair	G2O	7.91
Charity Shops, Pets and Other	G2P	0.00
Hot food Takeaway, Sandwich Shops, Cafes, Restaurants	G3A	11.51
Hairdressers, Barbers, Beauty Salons	G3B	3.60
Dry Cleaners, Laundrette	G3C	0.00
Travel Agents	G3D	0.72
Banks, Accountancy	G3E	5.04
Building Societies	G3F	0.00
Auctioneers, Estate Agents	G3G	0.00
Post Office, Employment, Careers and information	G4A	1.44
Vacant	G4B	5.76
Total		**100.00**

This displays a reasonable level of diversity within the retail offering, with 19 of the categories out of 30 represented (excluding vacant units). The three Goad categories that have the highest proportion of units are ‘Women’s, Girls and Children’s Wear’, ‘Mixed and General Clothing’ and ‘Hot Food Takeaway, Sandwich Shops, Cafes and Restaurants’.

It is anticipated that this information will become more useful over time when there is sufficient data to compare with other centres, but in the meantime it provides an interesting overview of the types of 'retail' present in the Core Retail Area. Notably, there are no charity shops within the Town Core Retail Area.

Within the Core Retail Area, a 'Façade Activation' study was carried out on a sample section of the High Street. This categorises buildings for their interest, based on aspects such as size, details, character, number or doors and the transparency of the unit (smaller units and high transparency being rated highest). Large units with few doors, and uniform facades with no details or nothing to look at, score poorly.

This was the first year that the study has been carried out and it is intended to use this technique across the Core Retail Area in future years. However the preliminary results of the assessment highlighted the high quality and high level of interest of the buildings on the high street, largely as a result of their historic nature and detailing, and as a result of the pattern of small units.

Another research technique used for the first time was the 'Place Inventory'. This was an assessment of the physical public realm as well as an assessment of the experience of using public space. This was carried out in Market Square and highlighted the high quality of the space with positive aspects such as the lack of vehicular traffic and feeling of safety in the space. However some specific elements were lacking, for example formal and informal places to sit. Having trialled the Place Inventory, in future years it is intended to expand on this technique to provide a more comprehensive assessment of public spaces in the Core Retail Area.

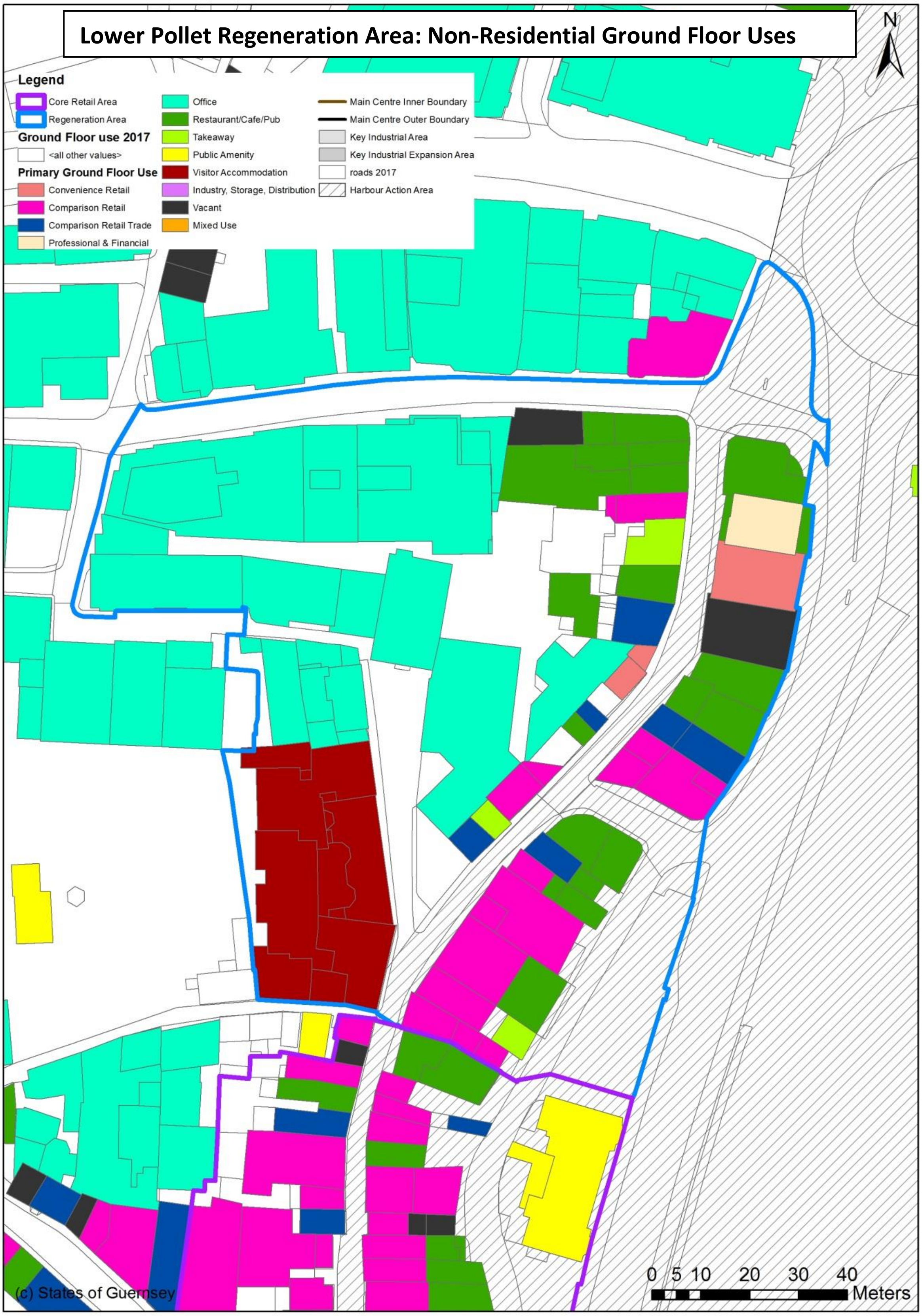
Finally footfall counts were carried out as a measure of vitality. These were conducted to a consistent procedure but the evidence has limitations in that it provides a small snap shot in time. Building up this information over time will ensure it is considered in an appropriate context as currently there is insufficient data to compare data sets for anomalies.

The footfall data for 2017 showed that the highest count for the Core Retail Area was between 12 and 2.30pm, compared to morning and late afternoon counts. Footfall was also low during the evening survey. Of all the areas where footfall counts were undertaken, they were by far the highest in the Town Core Retail Area. It is hoped that monitoring of footfall annually will enable any trends to be identified and whether specific developments have an impact on footfall.

Overall the evidence creates a picture of a high quality, attractive environment with an appropriate range of uses and no particular signs of decline.

Lower Pollet Regeneration Area

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



Map 7: Lower Pollet Regeneration Area Ground Floor Uses 2017

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

Core Retail Area, and a large proportion of offices in Le Truchot and La Plaiderie. Moores Hotel also has a prominent position within the Regeneration Area..

Figure 4 below shows the breakdown of ground floor uses in the Lower Pollet Regeneration Area.

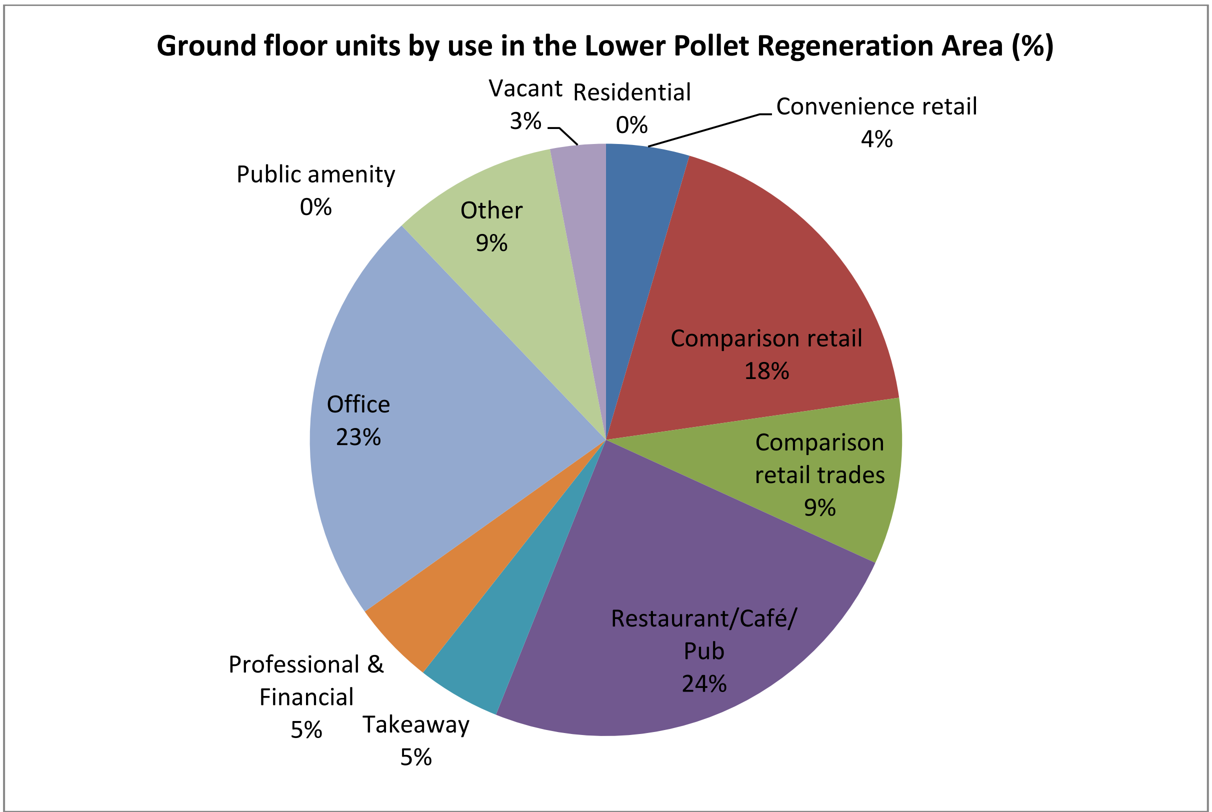


Figure 4: Ground floor units by use in the Lower Pollet Regeneration Area

As shown by the data, there are higher percentages of Office and Restaurant/Café/Pub uses when compared with the Core Retail Area, with retail accounting for a total of 31% of ground floor uses, compared to 68% in the Town Core Retail Area. The high percentage of offices in particular reflects the incorporation of La Plaiderie and Le Truchot within the Regeneration Area. Figure 5 below shows the known uses of upper floors in the Lower Pollet Regeneration Area by use type and percentage. The vacancy levels are low, at 3% which equates to 2 units.

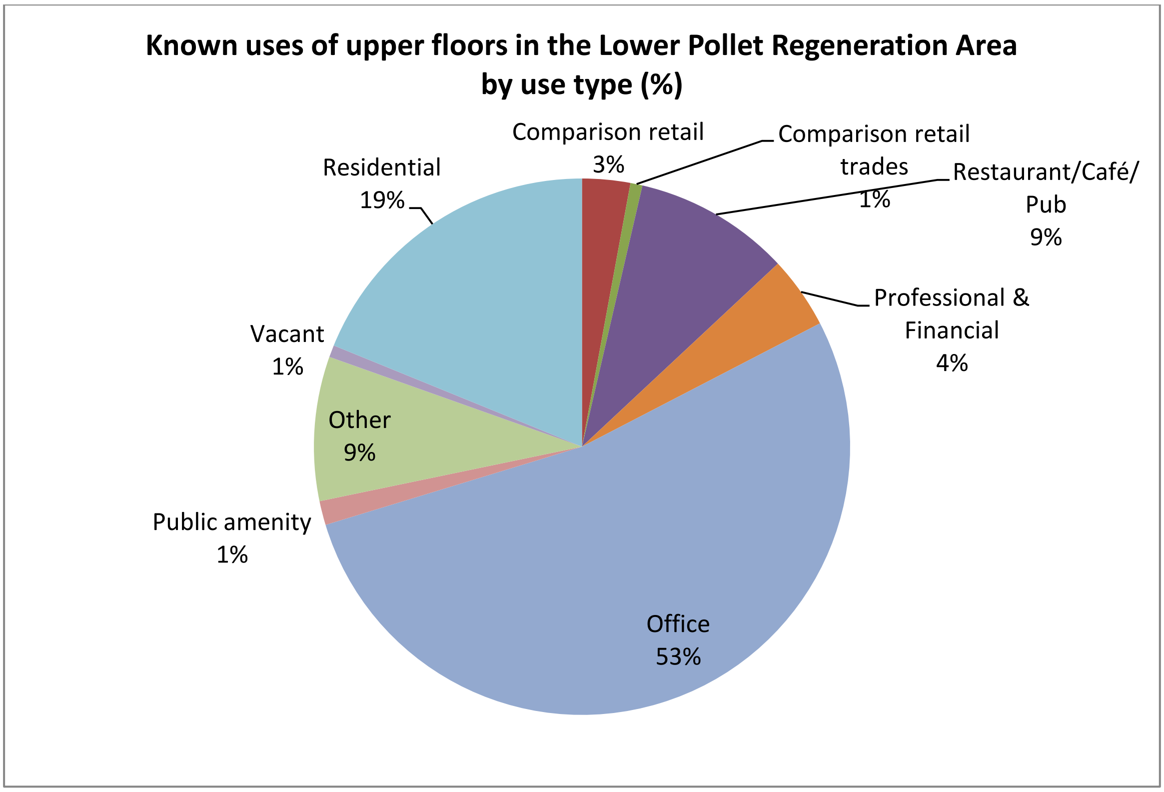


Figure 5: Percentage of upper floor units in different uses within the Lower Pollet Regeneration Area, where known

The balance of known uses on upper floors within the Lower Pollet Regeneration Area also differs significantly to those uses in the Core Retail Area, with a high proportion of office use (53%) again reflecting La Plaiderie and Le Truchot within the Regeneration Area. This reflects the spatial distribution and clustering of office uses in the area. The 'Other' use refers to Moores Hotel which occupies several units within the Regeneration Area.

In terms of building condition, 3% of units rated as poor and a higher percentage were rated as fair compared to the Core Retail Area. However the vast majority of units still rated as good (69%). Figure 6 below shows the relevant percentages.

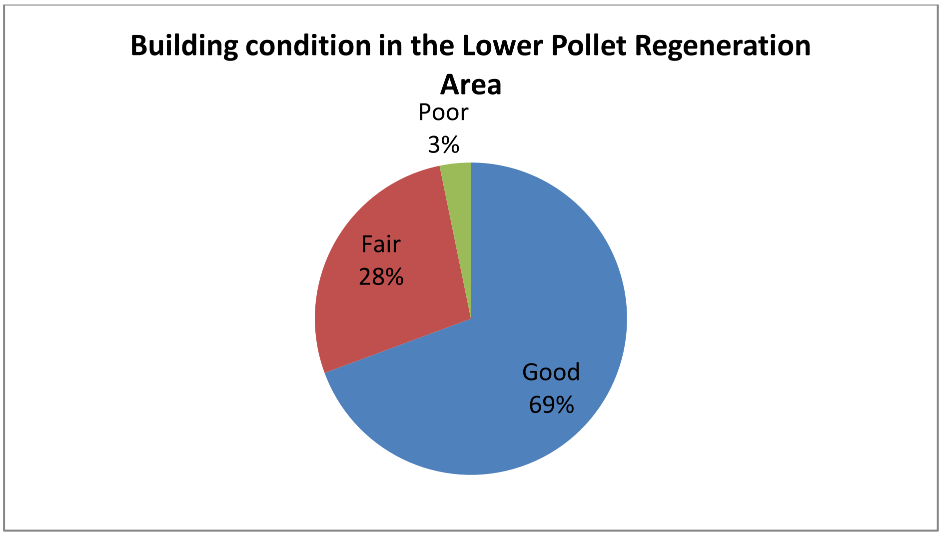


Figure 6: Building condition in Lower Pollet Regeneration Area

There is some conflict between pedestrians and vehicles in the Lower Pollet area, as noted in the 2013 Retail Strategy, as the area does not benefit from the same level of pedestrianisation as the Core Retail Area. There are particular issues during the late evening and night, for example when the nightclubs and bars in the area close. Linked to this is the use of the Weighbridge taxi rank, which the Retail Strategy observes as being very busy in the evenings but much less frequently used in the daytimes. There could be potential to relocate the taxi rank to a public transport 'hub' in Town, which could in turn provide opportunities to reduce the conflict between vehicles and pedestrians in the Lower Pollet.

The façade activation study will be completed more comprehensively in the Regeneration Areas in future, but preliminary assessment showed a high level of interest in parts of the Regeneration Area (such as Le Pollet) because of the small units with high levels of detail and transparency. North Esplanade and North Plantation were rated lower, with less detail and less transparency, as were the office buildings for example on Le Truchot.

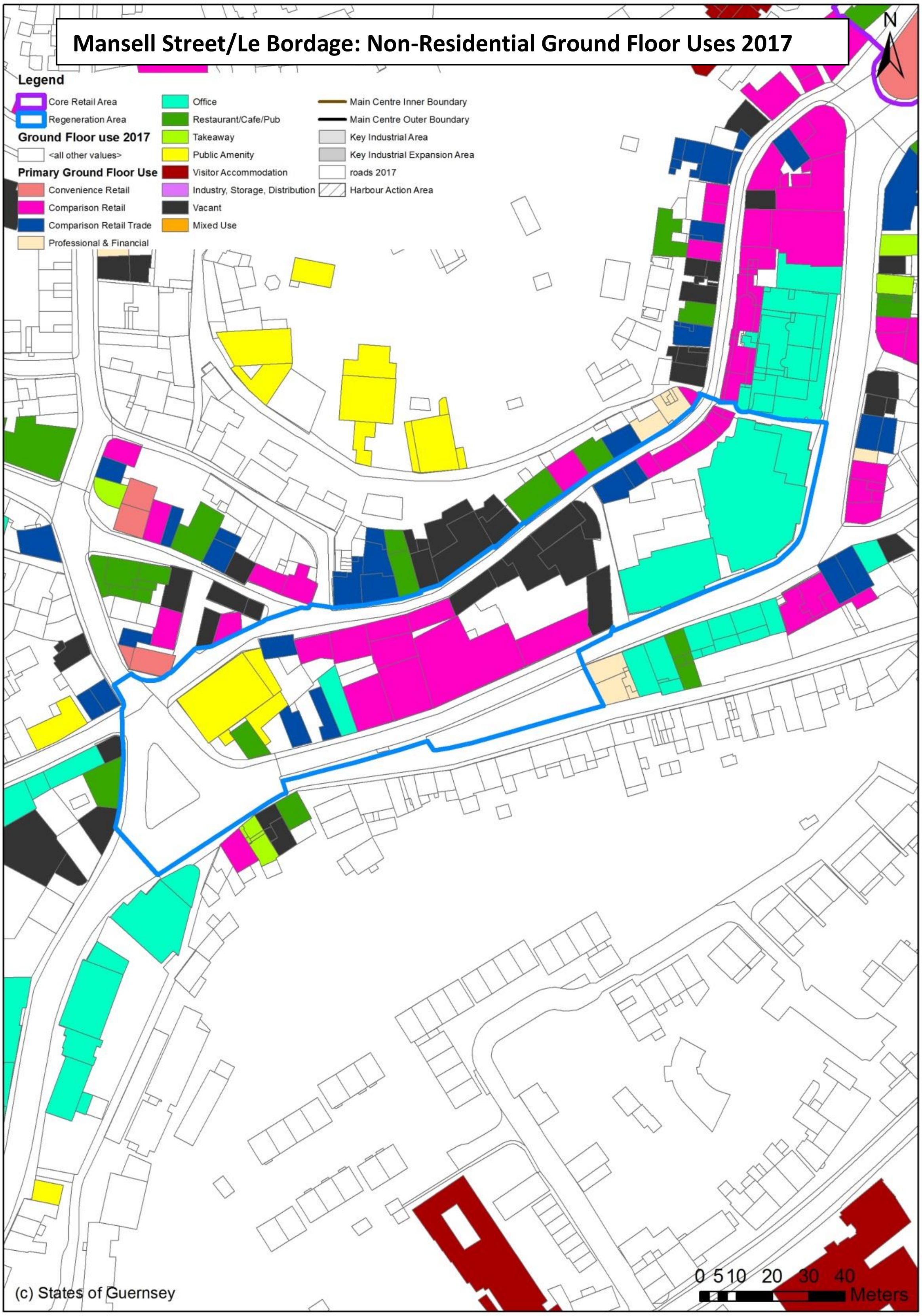
The Place Inventory was carried out at North Plantation, where aspects such as the presence of vegetation and places to sit were scored highly. As with the Core Retail Areas, it is intended to expand on this assessment technique to more fully assess the Regeneration Areas in future years.

Footfall counts were carried out within the Regeneration Area, and once again the counts carried out around midday indicated higher footfall than at other times. The Saturday counts were also notably lower than weekday counts, although as currently there is only one data set this could be an anomaly. However, this could be explained due to offices being less likely to be fully staffed at the weekend, potentially reducing the number of people in the area on a Saturday which indicates the role of offices and office workers in promoting vitality and viability within Town.

The Lower Pollet Regeneration Area overall appears to be in reasonable shape though the condition of buildings could be improved and investment in the area would be beneficial, as well as addressing the conflict between pedestrians and vehicles. The prevalence of offices adds to the vitality and viability of both the Regeneration Area itself but also the Core Retail Area, as office workers use the shops and facilities of Town. The vacancies will be monitored to ascertain if they are long term or short term.

Mansell Street/Le Bordage Regeneration Area

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



Map 8: Mansell Street/Le Bordage Regeneration Area

As shown, there is a cluster of offices at ground floor level at the eastern end of the Regeneration Area fronting Le Bordage, and a group of comparison retail units in the centre of the Regeneration Area with frontages on Mansell Street and on Le Bordage. Trinity Church forms a focal point at the top of Mansell Street.

Figure 7 below shows the breakdown of ground floor uses in the Mansell Street/Le Bordage Regeneration Area by percentage.

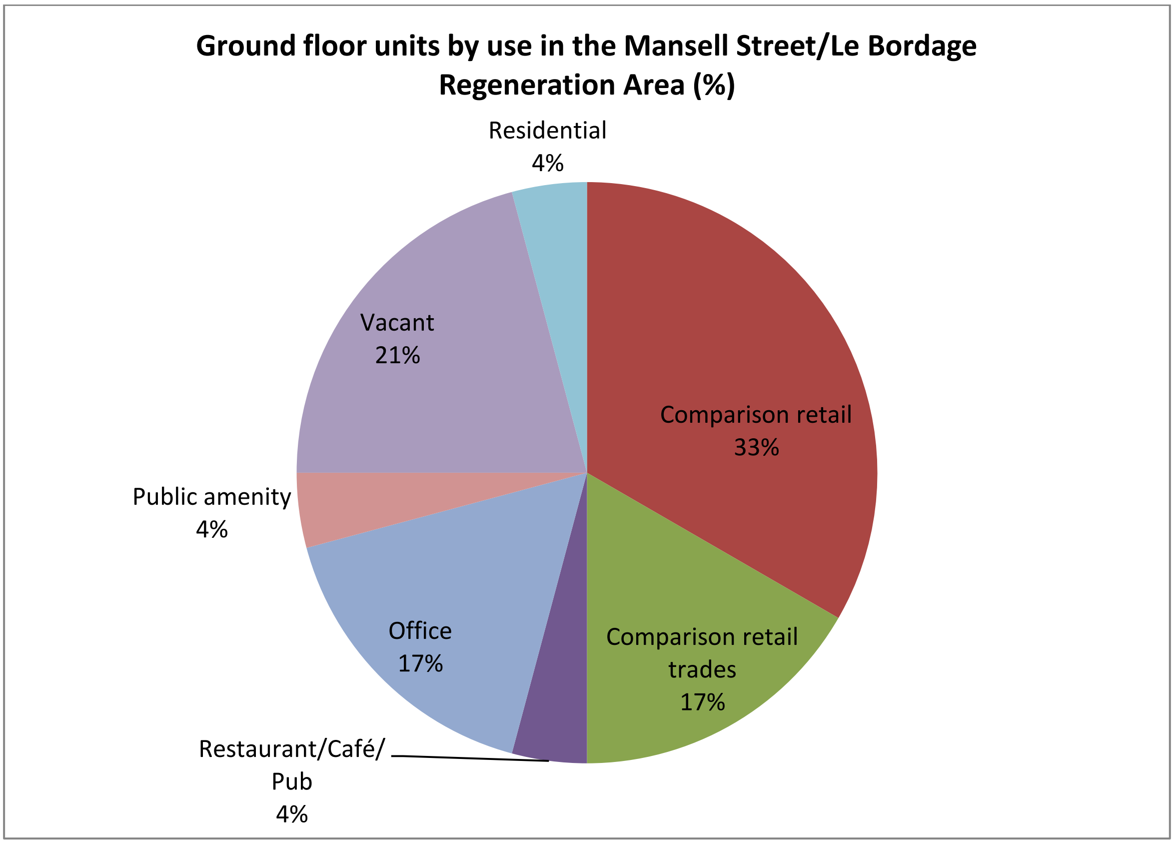


Figure 7: Ground floor units by use in the Mansell Street/Le Bordage Regeneration Area

There is a higher percentage of retail uses in this Regeneration Area compared with the Lower Pollet, and the vacancies are higher than both the Core Retail Area and the Lower Pollet Regeneration Area at 21%. This equates to 5 units (including one derelict unit at Ideal Furnishings which has since been removed) out of 27 surveyed.

Figure 8 below shows the known uses of upper floors in the Mansell Street/Le Bordage Regeneration Area by percentage.

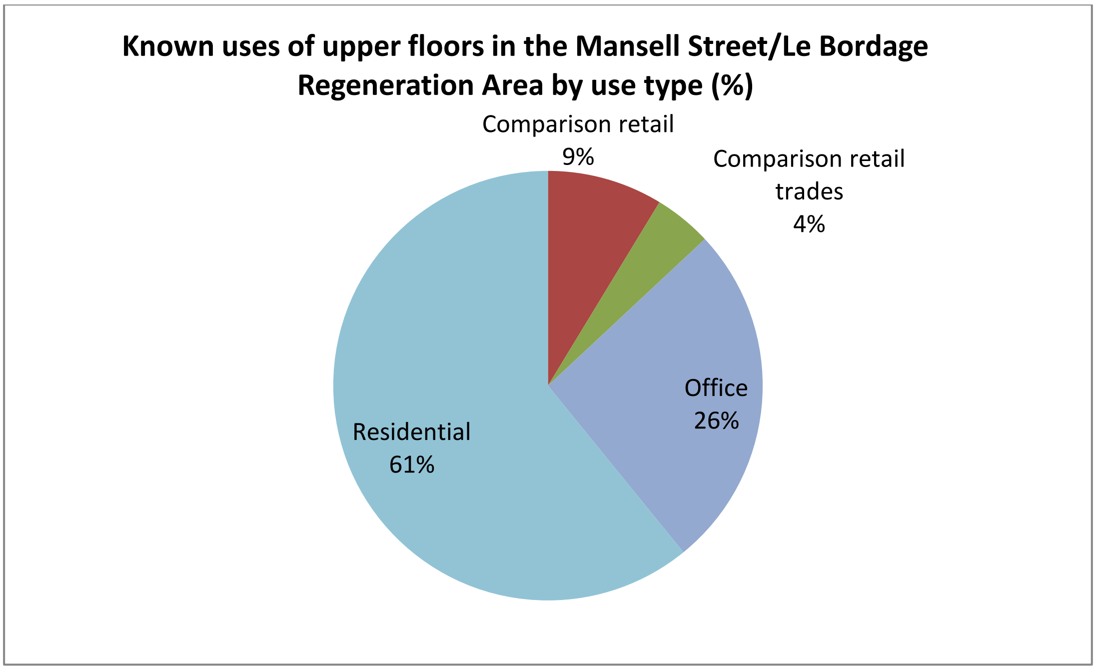


Figure 8: Percentage of upper floor units in different uses within the Mansell Street/Le Bordage Regeneration Area, where known

In contrast to the Lower Pollet Regeneration Area, there is a high percentage of residential use on upper floors within the Mansell Street/Le Bordage Regeneration Area, at 61%.

Although building condition within the Regeneration Area was generally good, there was a percentage of buildings that were rated as poor (18%) and fair (17%) as shown below in Figure 9, indicating that the area would benefit from inward investment. This includes the portion of Ideal Furnishings that has since been removed.

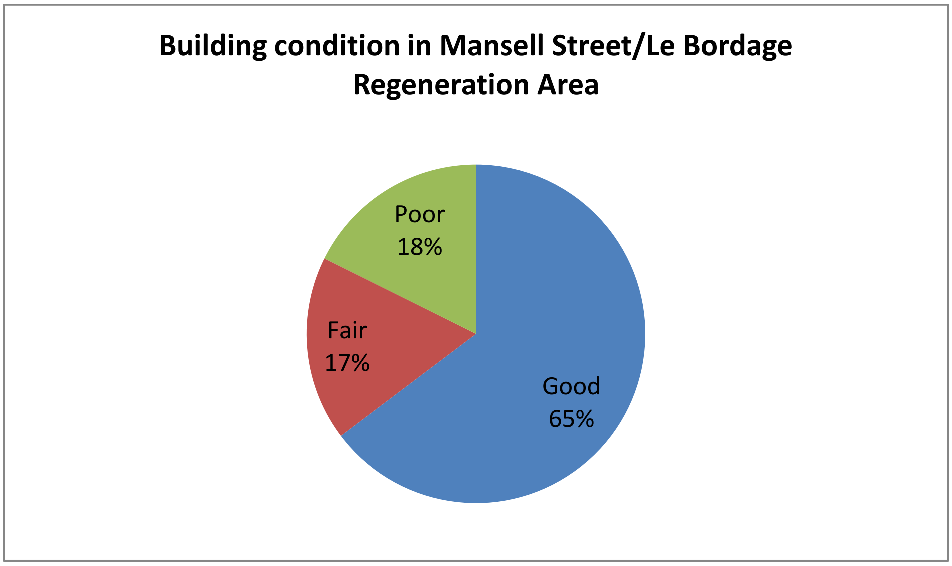


Figure 9: Building condition in Mansell Street/Le Bordage Regeneration Area

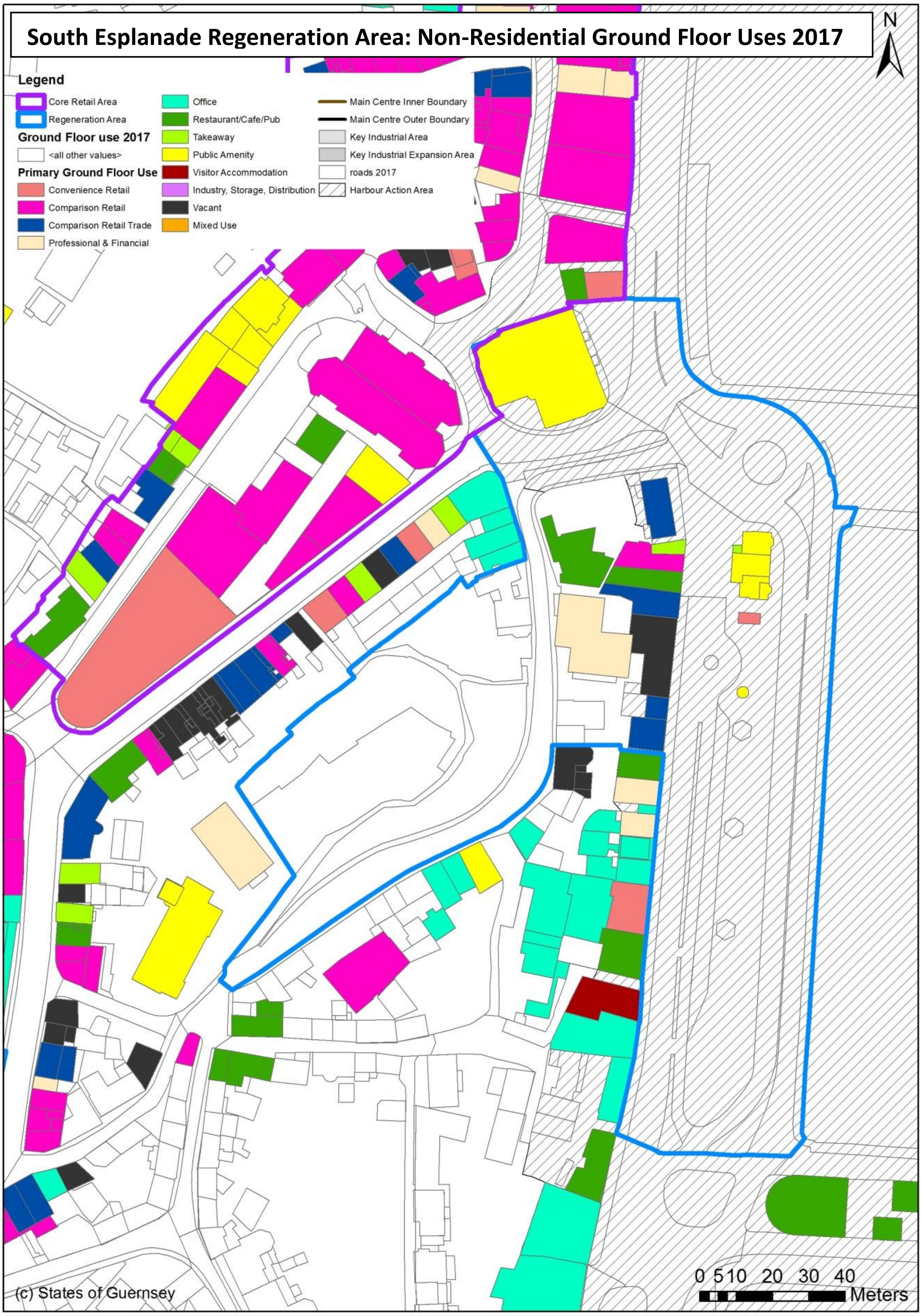
The building facades were rated highly on Mansell Street, with small units, high transparency and a high level of detail. However on Le Bordage the units were not rated as highly for their interest and were largely lacking in transparency, which relates both to the use of buildings as offices (where transparency might not be expected to be so high) and also to the Ideal Furnishings shop frontage. A lack of transparency can reduce dwell time, where people walk quickly by rather than stopping to 'window shop'. This is potentially exacerbated on Le Bordage by stretches of narrow pavement and fairly high volumes of traffic. There is a car park on Le Bordage (the only car park within the Regeneration Area), though this area could perhaps be utilised more efficiently.

Mansell Street is largely pedestrianised and, with the bunting and floral planters, creates a pleasant environment for shoppers. As before, footfall counts were undertaken in the Regeneration Area which indicated that footfall was higher during the middle of the day and was lower during the Saturday counts. This potentially relates to office workers walking to and from Town during weekday lunchtimes, given the presence of offices outside the Regeneration Area on La Charroterie, Rue du Pre and Park Street.

A Place Inventory was undertaken in Trinity Square which emphasised the potential of the public realm, with places to sit and rest, attractive planting and a general feeling of safety. However traffic dominates the area and there are no safe crossing points, which places limitations on the usability of the space.

Overall, the Mansell Street/Le Bordage Regeneration Area has a lot of potential and there are areas, as well as individual businesses, which appear to be thriving. However there are several vacant units and the building condition could be improved in some cases. Trinity Square itself has the potential to contribute very positively to the area, but is at present under used largely due to the dominance of traffic in the area.

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



Map 9: South Esplanade/Mignot Plateau Regeneration Area Non-Residential Ground Floor Uses 2017

Map 9 shows the uses within the South Esplanade/Mignot Plateau Regeneration Area are mixed but differ from the Core Retail Area. Town Church forms a prominent public amenity use, and the statue of Prince Albert adds to the public realm and creates a local landmark. Comparison retail trades form a significant percentage of uses at ground floor level. The uses in the Regeneration Area support a wider overall offering in Town and add to the vitality and viability of the area.

Figure 10 below show the ground floor uses of the units within the area by percentage.

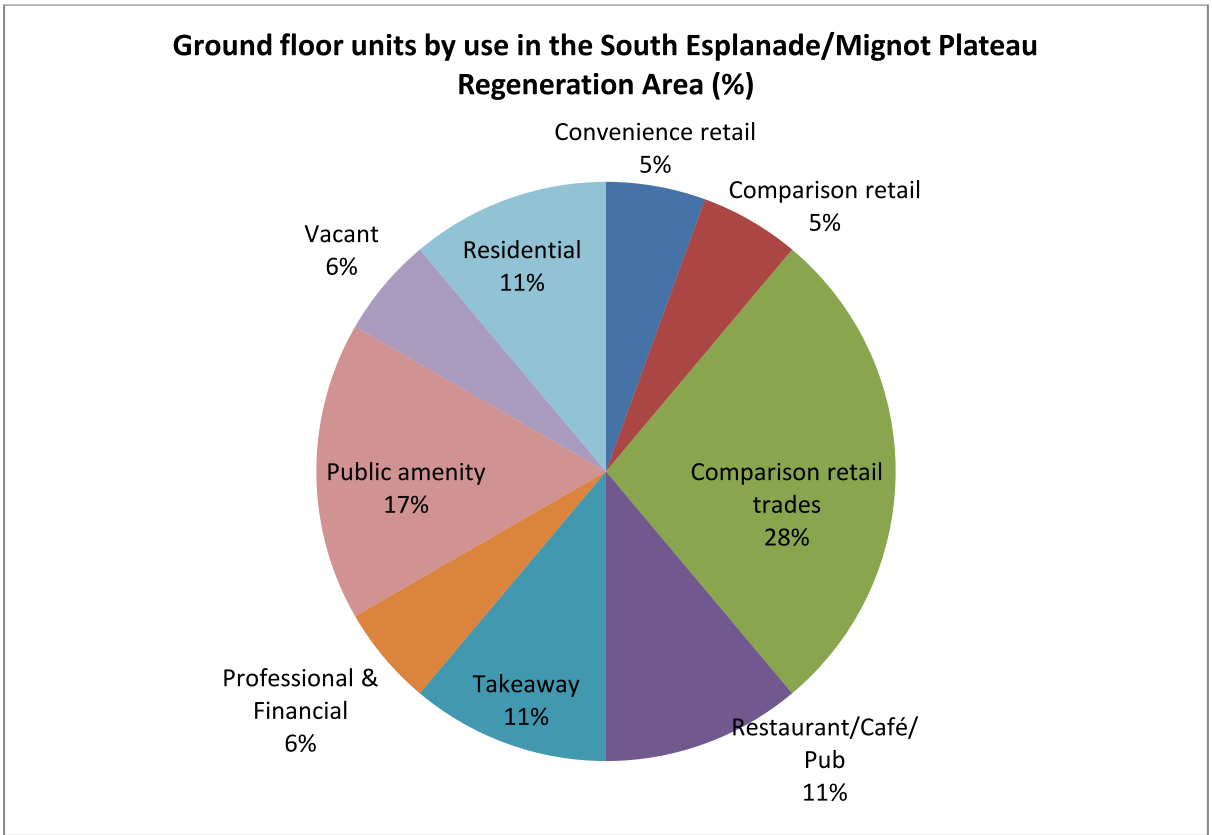


Figure 10: Ground floor units by use in the South Esplanade/Mignot Plateau Regeneration Area

There is a higher proportion of Public amenity uses within the South Esplanade and Mignot Plateau Regeneration Area compared to the other Regeneration Areas at 17%. This relates to the Town Church, public toilets and bus information kiosk, for example. Retail uses make up 38% of the units, with the majority of those being comparison retail trades (such as travel agents). The percentage of vacancies appears comparatively high at 6%, but this did in fact equate to just one unit.

In terms of the known uses of upper floors, these are shown below in Figure 11.

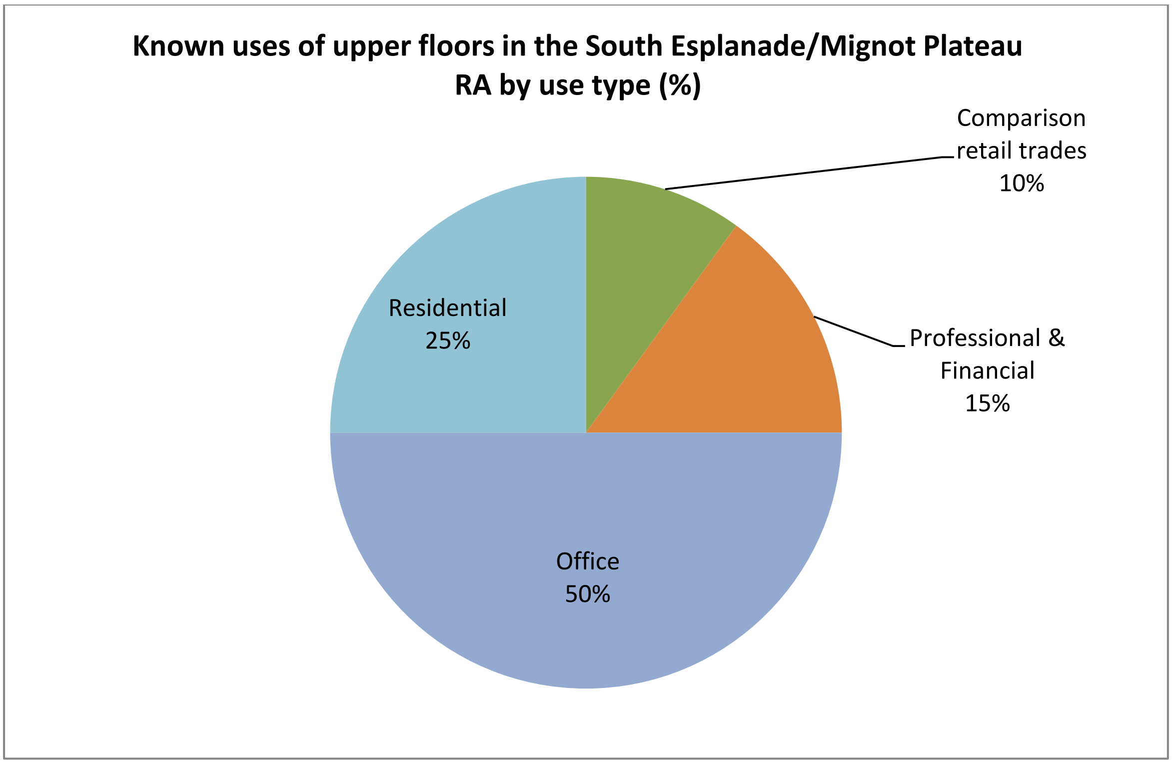


Figure 11: Percentage of upper floor units in different uses within the South Esplanade/Mignot Plateau Regeneration Area, where known

As shown, the upper floors are predominantly occupied by office space, with a smaller amount of residential use (25%), Professional and Financial (15%) and comparison retail trades (10%). Again this is reflective of the spatial distribution of offices in Town.

There were proportionately fewer buildings in this Regeneration Area rated as 'Good', than the other Regeneration Areas, though none were rated as poor (see Figure 12 below).

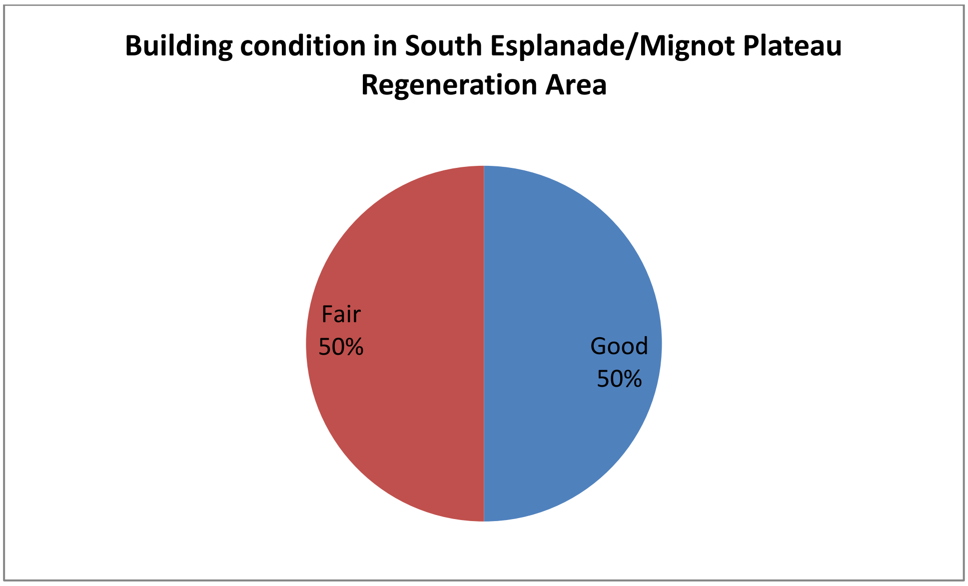


Figure 12: Building condition in South Esplanade/Mignot Plateau Regeneration Area

The Façade Activation assessment found that the units lacked detail and did not display the same level of interest as found in other areas of Town. The Place Inventory around South Esplanade highlighted dominance of traffic in the area, with 6 lanes of traffic, the poor state of cleanliness and the generally unattractive visual environment. However there are places to sit and rest, places that provide shade and shelter and a reasonable presence of vegetation though the environment can feel cluttered.

A positive aspect of the South Esplanade and bus terminus area are the views to the marina and of Castle Cornet beyond, as well as the proximity of Havelet Bay (although the pedestrian connectivity with Havelet Bay is poor). Similarly at Mignot Plateau there are impressive views of Town and the Islands, and there could be potential opportunities to derive more benefit from these panoramas.

Footfall data was again collected and this will be added to over time in order to gain a more accurate perspective and to analyse trends. However the 2017 counts generally showed the highest levels of footfall during the middle of the day, although counts undertaken between 3pm and 5pm were only slightly lower in this area. This could be as a result of people using the bus terminus after school or work, or because of people walking to parked cars, for example the longer stay car parking at Castle Emplacement and La Vallette. The Friday evening count in this location was the highest of the evening counts in any location, which is potentially due to the presence of cafes, bars and restaurants further down the South Esplanade and at Havelet, some of which have been recently redeveloped. In common with the other areas, footfall was lower during the Saturday counts compared to the weekday counts.

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

Summary of Town Core Retail and Regeneration Areas
The use survey highlights the different functions of the Regeneration and Core Retail Areas, and the building condition information gives a simple indication of the condition of the units, with the Core Retail Area rating most highly and the South Esplanade having the lowest number of units rated as good.

Figure 13 below shows the relative percentage of ground floor uses in each of these Areas, for comparison.

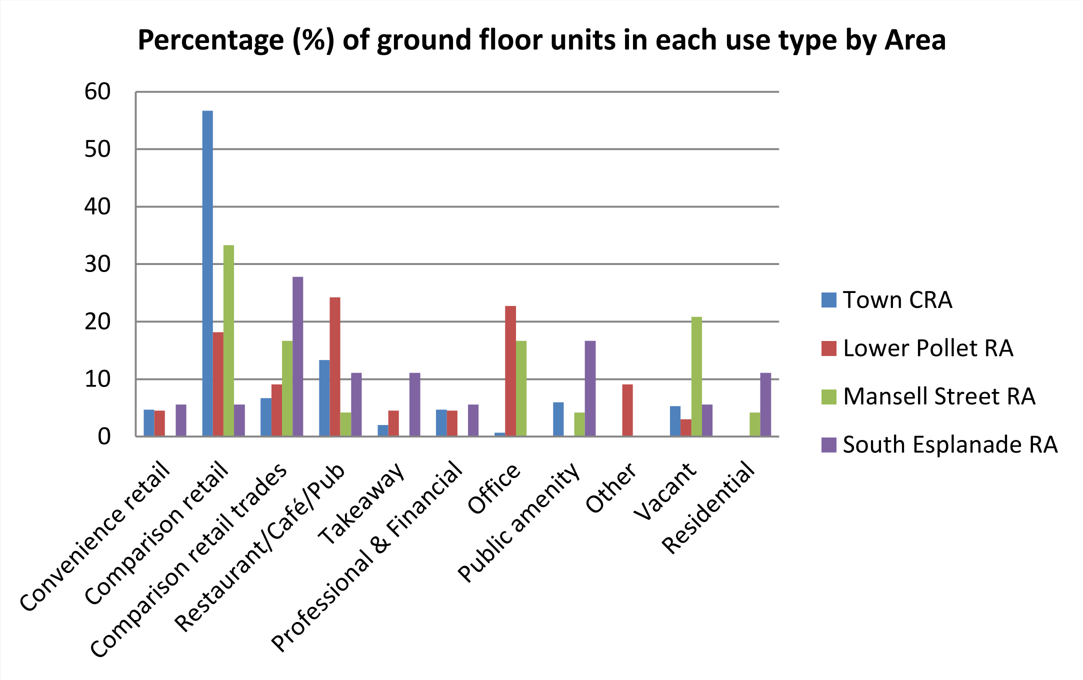


Figure 13: Percentage (%) of ground floor units in each use type by Area

Figure 13 clearly shows that the Town Core Retail Area has a greater percentage of retail units than any other use and a greater percentage of retail units than the Regeneration Areas and is therefore performing as intended.

Similarly, Figure 14 below sets out the upper floor units by type within each Area and again there are clear differences, with Mansell Street/Le Bordage Regeneration Area having a high proportion of residential uses on the upper floors, and the Lower Pollet and South Esplanade with significantly more office use at upper level. The Core Retail Area again has the greatest proportion of retail uses on upper floors.

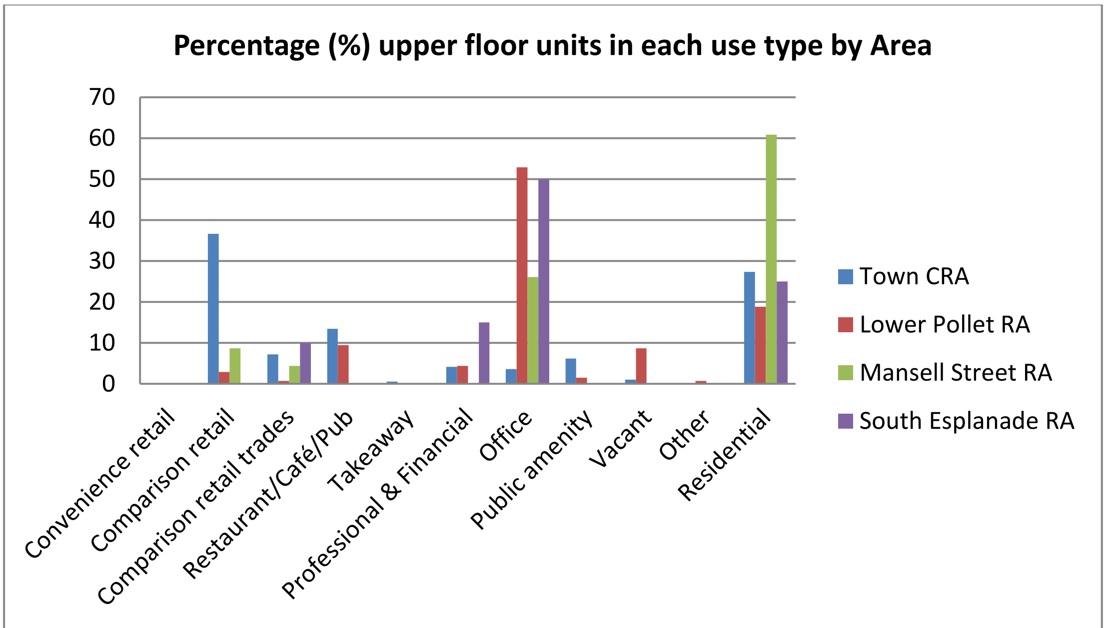


Figure 14: Percentage (%) of upper floor units in each use type by Area

Figure 15 below shows the building condition rating for each of the Areas.

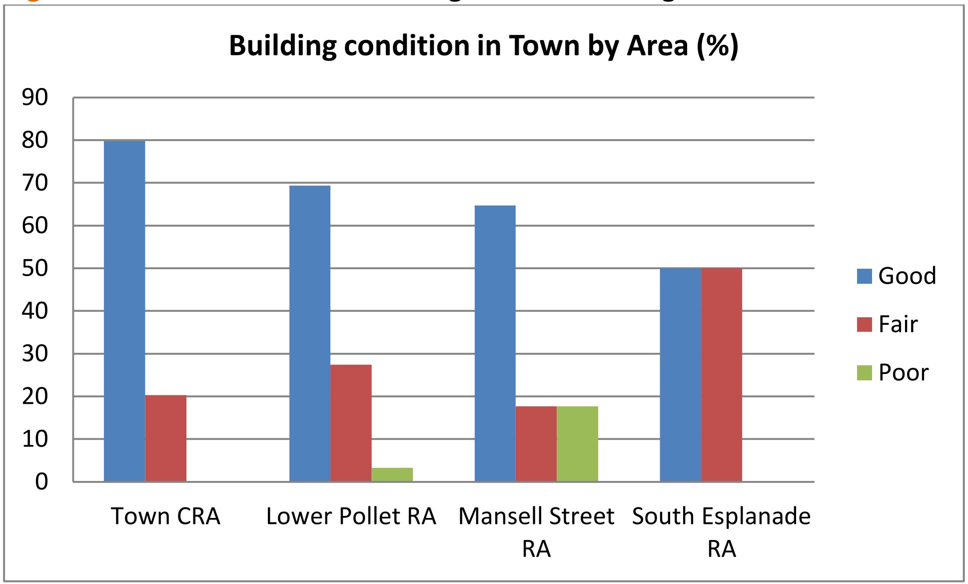


Figure 15: Building Condition in Town by Area (%)

Town Core Retail Area has the greatest percentage of buildings in Good condition, which cumulatively contribute to the high quality, attractive street scene of the Core Retail Area. The Mansell Street/Le Bordage Regeneration Area has highest percentage of buildings rated as Poor, and this included the derelict part of Ideal Furnishings which has since been removed. The South Esplanade has the highest percentage of buildings rated as 'Fair'. This reflects the general character of the South Esplanade area, which feels somewhat run down in places compared to the other areas and which would benefit from inward investment.

Town Main Centre: Overall Summary and Conclusions

Town remains the Islands primary retail centre and the Core Retail Area appears to be functioning well. Indications from the footfall counts suggest the positive impact of office workers during the week, given the higher numbers than recorded on Saturday counts. This is a positive contribution to the vitality and viability of Town.

The spatial distribution of non-residential uses remains appropriate, with retail focused in the Core Retail Area and the Main Centre Inner Area and Regeneration Areas contributing a supporting role with a diverse mix of uses, enhancing the vitality and viability of the broader Town area. Each of the Regeneration Area would benefit from inward investment so their designation remains relevant.

The Harbour Action Area will play a vital role in improving the relationship between Town and the Harbour, including addressing conflict between road users and in securing investment and providing for development which will further enhance the facilities, services and offering in Town.

The historic environment of Town and the evidence of investment through bunting, floral displays and street entertainment provide an attractive and pleasant environment.

However improvements could be made to the public realm which could enhance the shopping ‘experience’ and contribute to the vitality and viability of Town.

Overall, Town Main Centre appears to be functioning well and there are clear strengths to build on, as well as weaknesses to address.

St Sampson/Vale (The Bridge)

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

Interviews with various stakeholders about the Bridge Main Centre were consistent in their perspective that traffic negatively dominates the Bridge environment, and, as with Town, there is a lack of public space to 'hang out' in, with no particular focal point. As such, the two roles of the Bridge as a 'commuter route' and 'a place to be, socialise and shop' were noted to be somewhat in conflict.

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

The 2017 Retail Survey reported that customers would like to see improvements at The Bridge that would enhance the leisurely shopping experience. The majority of respondents felt that the area needs improvement with regard to the range of shops, their environs and the road layout.

The Bridge Accessibility

In terms of alternatives to the private car, there are frequent bus connections from The Bridge to Town Terminus, and also to the north of the Island. The P2 route provides a connection to the west of Town, including the hospital. However there is no direct link to the airport and, with the exception of the round-island bus route, access to the south and west involves a change of bus at the Town Terminus. There is a small taxi rank on The Bridge, close to the Marine & General buildings, opposite Boots The Chemist.

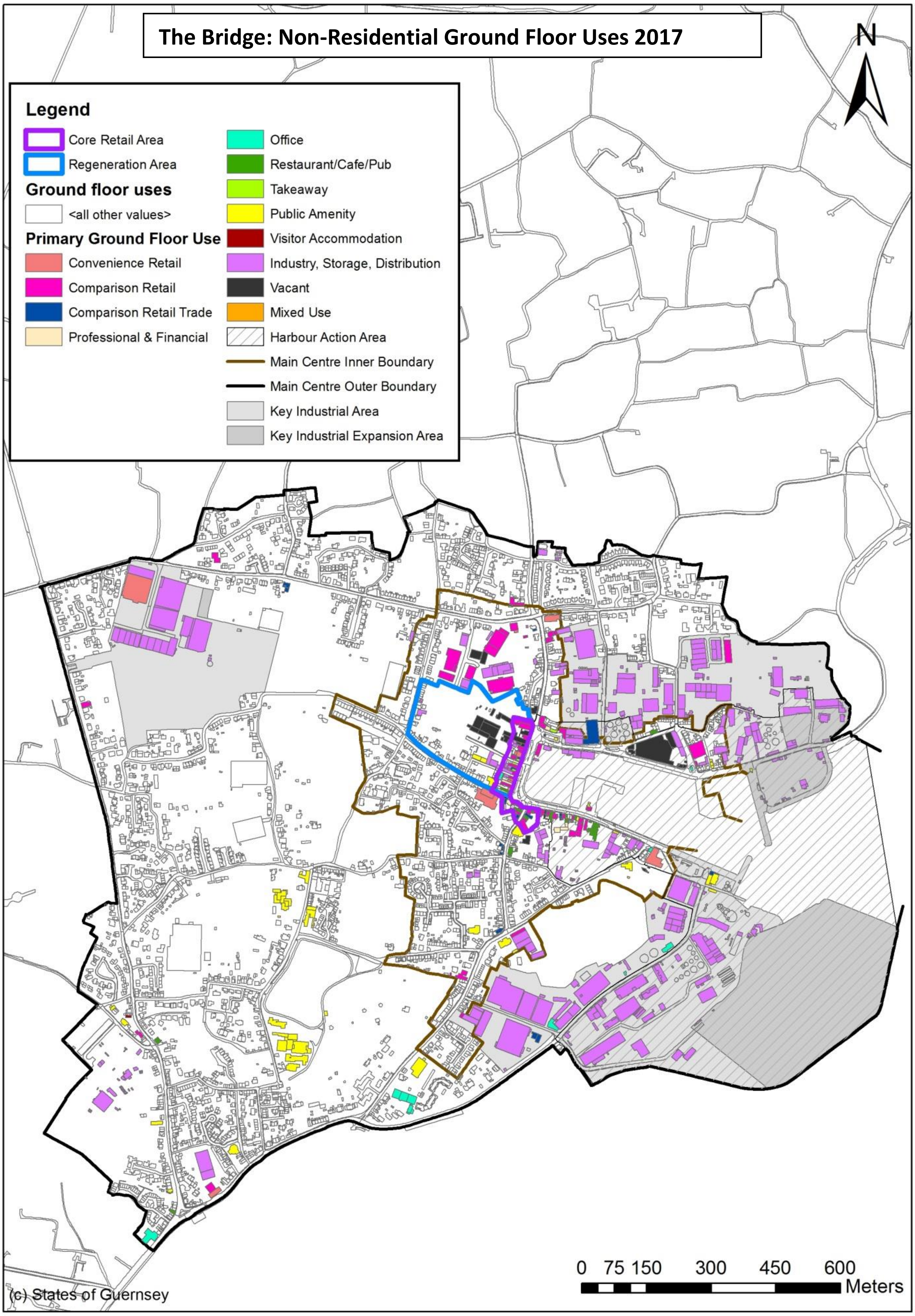
As well as the connections on land, St Sampson's Harbour provides marina spaces for local yachts and motor boats, as well as providing access for liquid fuel ships berthing at high tide.

It is intended that more comprehensive data on accessibility will be available as monitoring progresses over time, including mapping pedestrian and cycle routes, building more robust data on footfall, and mapping cycle parking, motorcycle and disabled parking. The preliminary indications from the footfall data collected is that, unlike in Town, the footfall counts are generally higher during the Saturday counts than during the week, which might be explained by the smaller amount of office use in this Centre and the potentially greater reliance on the local residential population for maintaining vitality and viability. However, more consistent with Town, the counts are generally higher during the 12-2.30pm counts than morning, late afternoon and evening counts.

The Bridge Main Centre Inner and Main Centre Outer Areas
As shown in Map 10 below, within the Main Centre Outer Area, the Key Industrial Areas provide areas of more concentrated non-residential development, but otherwise there are few non-residential uses within the Main Centre Outer Area. Several Public Amenity uses, such as the school sites (St Sampson High School, St Mary and St Michael RC Primary School and Guernsey College of Further Education Delancey Campus) are located to the south of the Main Centre Outer Area.

Overall, industrial, storage and distribution uses form the majority of the non-residential uses in the Main Centre Outer Area, due to the presence of the Key Industrial Areas.

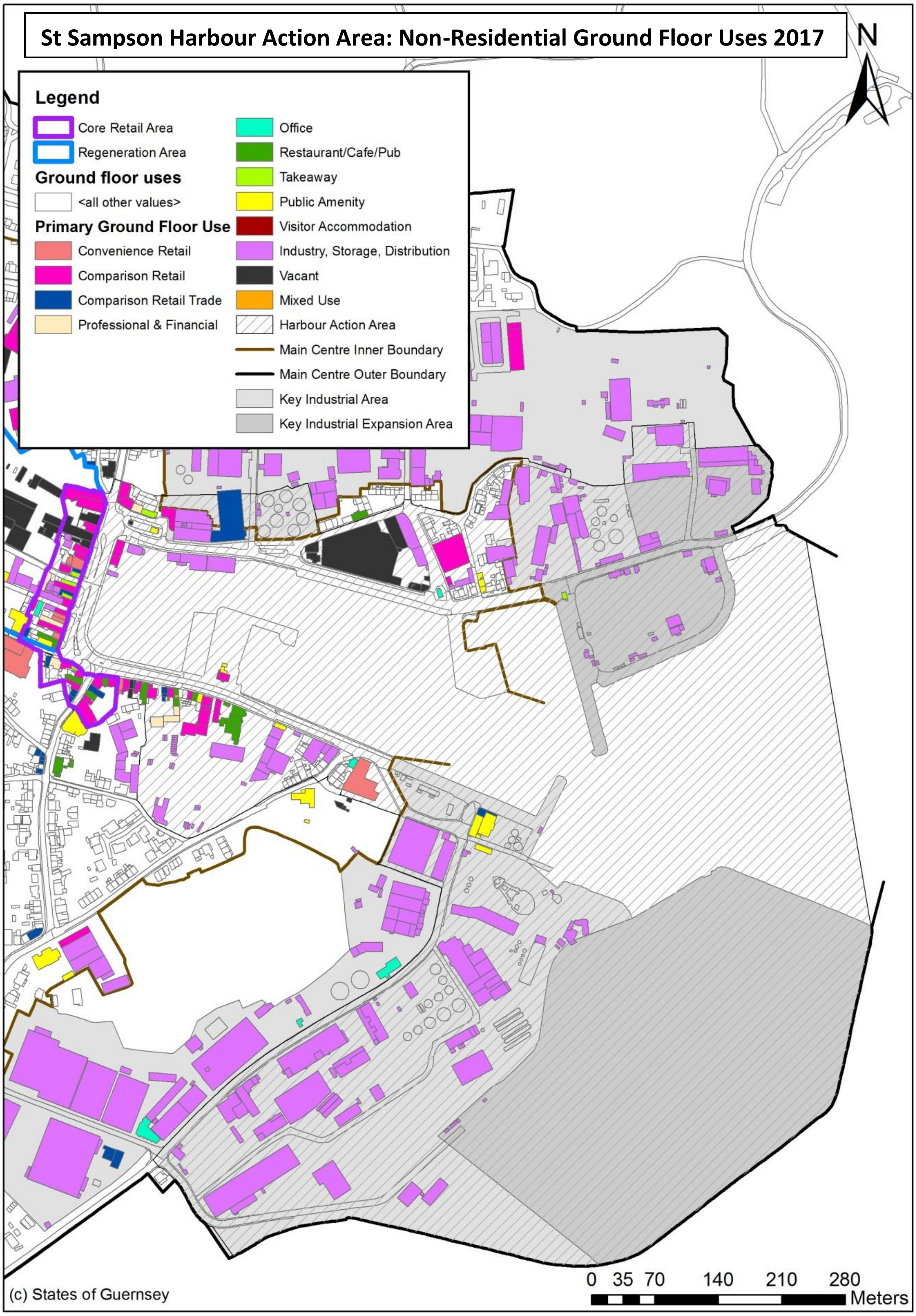
Within the Main Centre Inner Area the non-residential uses are focused around the Core Retail Area, and particularly around Southside and Northside, as well as the Lowlands Road Industrial Estate. There is a notable absence of office uses, which, in contrast, line significant parts of the routes into Town.



Map 10: Non-residential ground floor uses in The Bridge Main Centre 2017

St Sampson Harbour Action Area

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



Map 11: Non-residential ground floor uses in St Sampson Harbour Action Area 2017

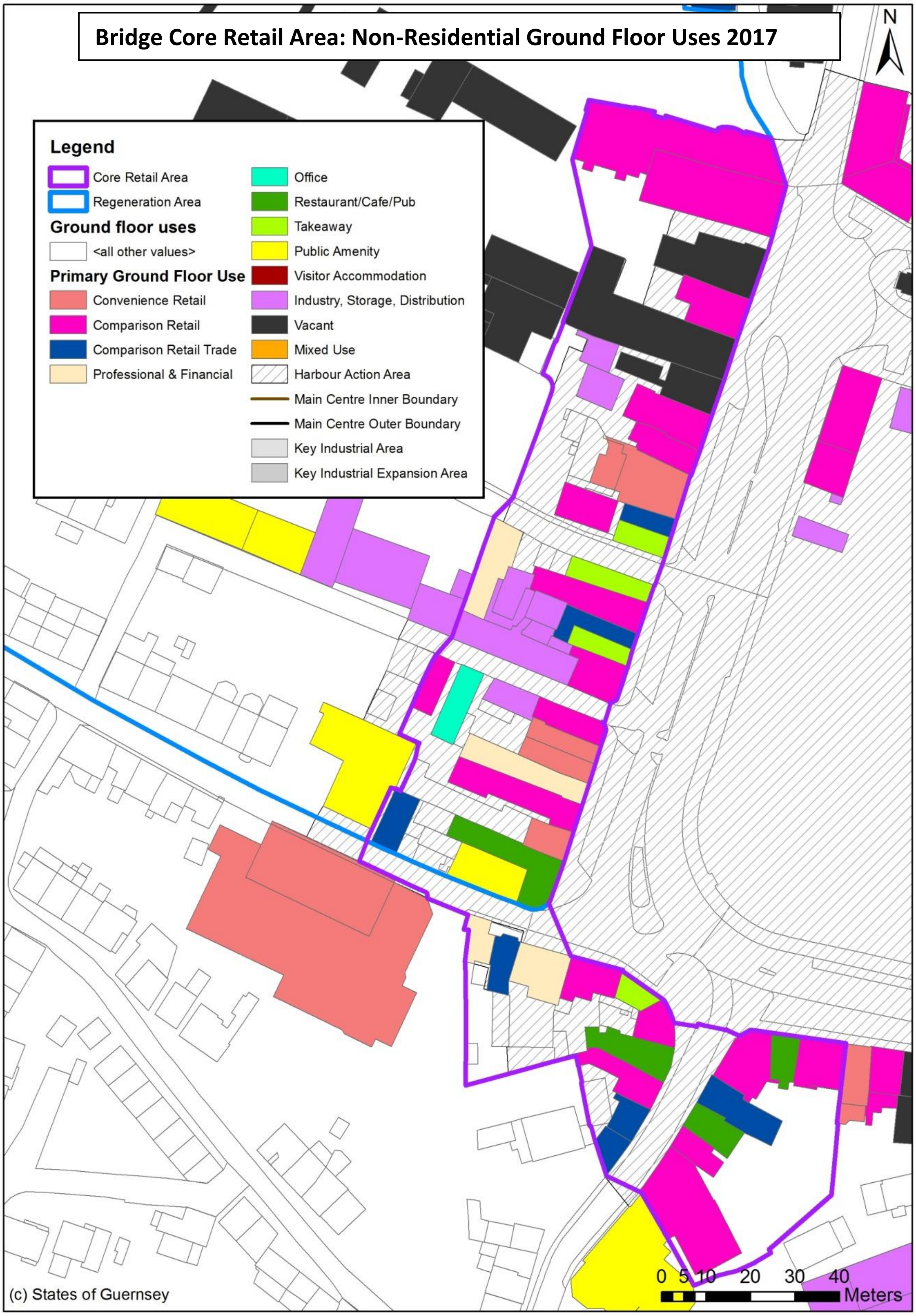
The outer edges of the Harbour Action Area accommodate predominantly industrial uses, but the designation also includes both South Quay and The Bridge Core Retail Area. As such there is a diverse range of uses within the Harbour Action Area, incorporating the commercial harbour, retail, restaurants, cafes and pubs, leisure and recreation (e.g. the marina) and other complementary uses. The former Quayside retail unit forms a significant vacancy within the Harbour Action Area.

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

The Bridge Core Retail Area

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

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



Map 12: Non-residential ground floor uses in the Bridge Core Retail Area 2017

There is a cluster of vacancies at the north end of The Bridge, but retail uses dominate. There are more convenience retail units within the Bridge Core Retail Area than in the Town Core Retail Area.

Figure 16 below shows the breakdown of uses by type at ground floor level in the Core Retail Area by percentage.

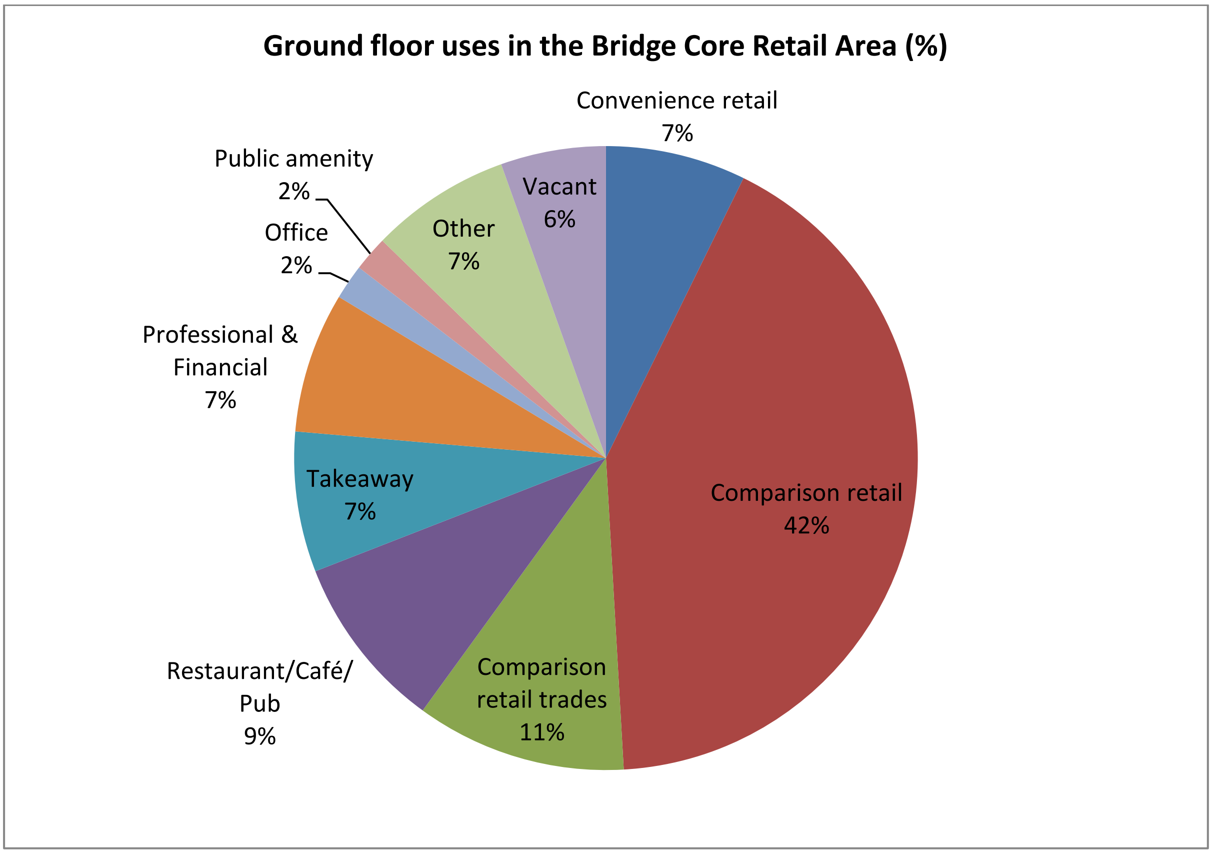


Figure 16: Percentage of ground floor units in each use within the Bridge Core Retail Area

As shown above, approximately 60% of ground floor units are in retail use (that is, convenience, comparison or comparison retail trades). This is lower than the percentage of retail within Town Core Retail Area (68%) but is still clearly the majority of units. Vacancies accounted for 3 vacant units in the Bridge Core Retail Area – one was soon to be Costa Coffee (which has since opened), one was under renovation (the former Press Shop) and one was the former Health Information Shop (which was in the process of moving across the street). This information appears to indicate a good mix of uses within the Core Retail Area, which is predominantly retail but complemented by appropriate supporting uses
Figure 17 below shows the percentage of known uses on upper floors within the Bridge Core Retail Area.

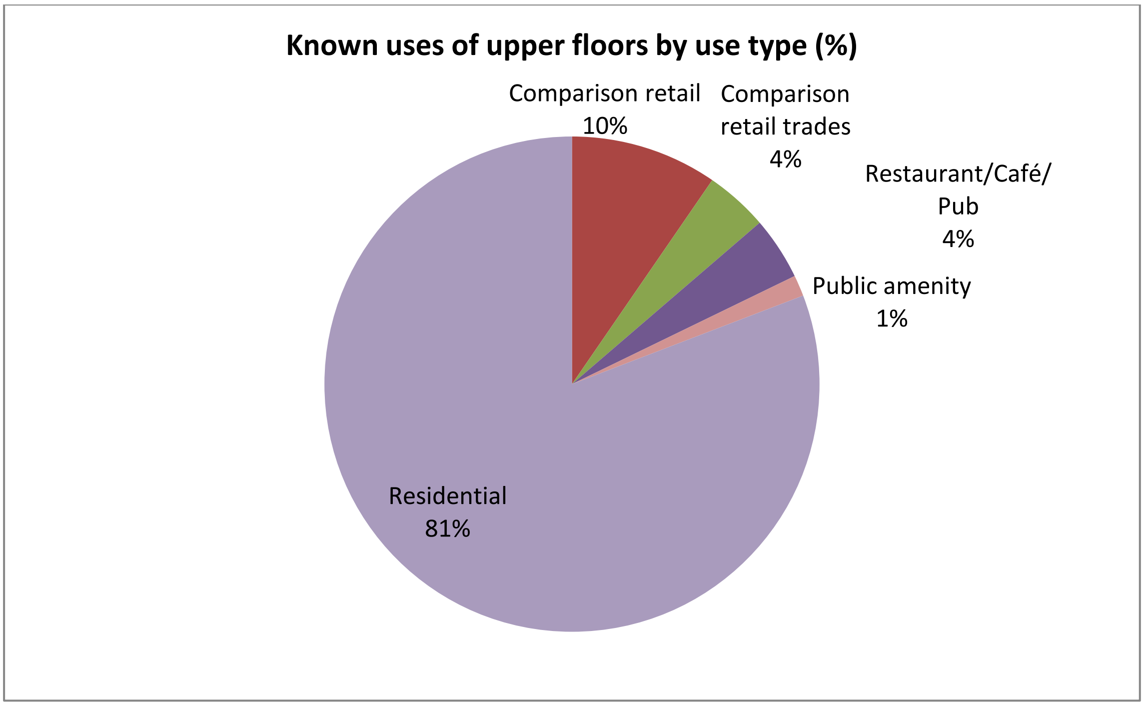


Figure 17: Known uses of upper floors by use type (%) in the Bridge Core Retail Area

Residential use is clearly the predominant upper floor use within the Bridge Core Retail Area, at 81%. This is in contrast to the Town Core Retail Area, which has approximately 27% of residential use on upper floors and highlights the role of the local population in supporting vitality and viability at the Bridge, compared with the role of office workers in Town.

A very small percentage of units within the Bridge Core Retail Area were open in the evenings (approximately 11%, or 5 units) with just 4 units open on Sundays (approximately 10%). The lack of evening opening is reflected in the footfall counts, and is indicative of a lack of evening and night-time economy.

Figure 18 below shows the condition of units in the Bridge Core Retail Area.

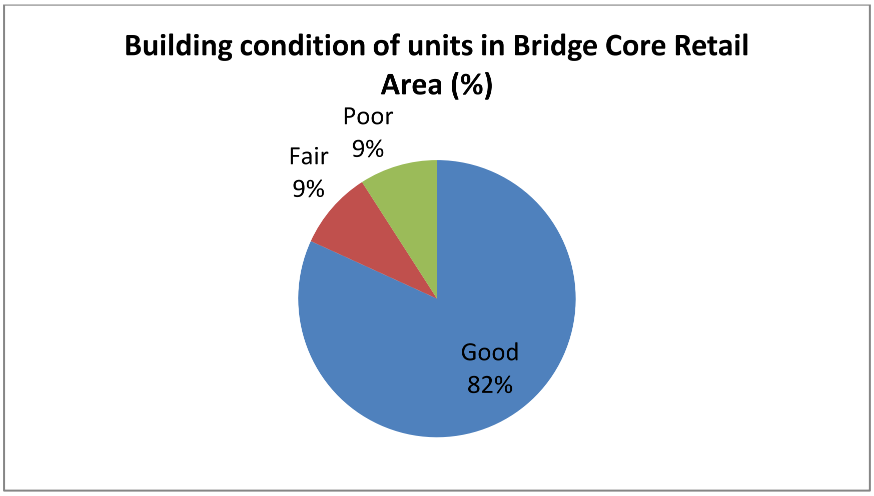


Figure 18: Building condition in the Bridge Core Retail Area

The majority of buildings in the Bridge Core Retail Area were recorded as in 'Good' condition (82%), with 9% rating as 'Fair' and 9% rating as 'Poor'. As in Town, this indicated positive investment, and monitoring over time will record improvements to those buildings ranked as 'Fair' or 'Poor'. This is also an interesting result as the overall impression of the Bridge, according to stakeholder interviews, was that it looks somewhat run-down. However taken individually, the majority of buildings in the Core Retail Area appear to be in a good state of repair.

As with the Town Core Retail Area, the Goad categorisation system has been applied, which groups similar uses whilst also providing a greater level of detail. In turn, this helps build an in depth picture of what makes up the respective Core Retail Areas. Not all uses are categorised, only those as shown in the Table 2 below, which includes the percentage of units within the Bridge Core Retail Area within each Goad class.

Table 2: Goad categorisation of the Bridge Core Retail Area

Use	Goad Category	Percentage
Bakers	G1A	0.00
Butchers	G1B	0.00
Greengrocers & Fishmongers	G1C	0.00
Grocery, Frozen Food & Supermarkets	G1D	0.00
Off Licence and Home Brew	G1E	0.00
Newsagents, Confectioners & Tobacconists	G1F	4.17
Footwear, Cobblers	G2A	2.08
Men's & Boys wear	G2B	2.08
Women's , Girls and Children's Wear	G2C	4.17
Mixed and General Clothing	G2D	2.08
Furniture, Carpets & Textiles	G2E	2.08
Booksellers, arts/crafts, Stationers, Copy Bureaux	G2F	2.08
Electrical, Home Entertainment	G2G	0.00
DIY, Hardware, Household Goods	G2H	0.00
Gifts, China, Glass and Leather Goods	G2I	0.00
Motor Accessories, Car, Motorbike or Boat Sales	G2J	2.08
Pharmacy, Toiletries, Opticians	G2K	6.25
Department, Variety and Catalogue Stores	G2L	0.00
Florists	G2M	0.00
Sports, Toys, Cycles & Hobbies	G2N	10.42
Jewellers, Clocks & Repair	G2O	6.25
Charity Shops, Pets and Other	G2P	12.50
Hot food Takeaway, Sandwich Shops, Cafes, Restaurants	G3A	14.58
Hairdressers, Barbers, Beauty Salons	G3B	12.50
Dry Cleaners, Laundrette	G3C	2.08
Travel Agents	G3D	0.00
Banks, Accountancy	G3E	4.17
Building Societies	G3F	0.00
Auctioneers, Estate Agents	G3G	2.08
Post Office, Employment, Careers and information	G4A	2.08
Vacant	G4B	6.25
Total		100.00

Table 2 above shows that the diversity of retail uses in the Bridge Retail Area is comparable to that in St Peter Port, with (excluding vacancies) 18 retail types represented, compared with 19 present in Town, out of the 30 Goad categories (again excluding vacant units). Within the Bridge Core Retail Area 'Sports, Toys, Cycles and Hobbies', 'Charity shops, Pets & Other', 'Hot Food Takeaway, Sandwich Shops, Cafes and Restaurants' and 'Hairdressers, Barbers, Beauty Salons' are the four Goad categories that most of the ground floor units fall within, which in part highlights the different offering of the Bridge Core Retail Area compared with the offering within Town Core Retail Area. Respondents to the 2017 Retail

Survey commented that there is a limited choice and poor quality of shops at the Bridge, as well as a lack of appealing places to eat, which is interesting given the range that the Goad results indicate and highlights the value of using both qualitative and quantitative data.

As with Town, a 'Façade Activation' study was carried out on a sample section of The Bridge Core Retail Area to categorise buildings for their interest, based on aspects such as size, details, character, number of doors and the transparency of the unit (high transparency being better than low transparency). Large units with few doors, and uniform facades with no details or nothing to look at, score poorly.

The preliminary results indicated that the buildings had a high level of interest. As with building condition, this is interesting because it suggests that the individual units are of a high quality, but the overall impression of the Core Retail Area is not generally as positive as in the impression of Town, primarily due to the dominance of traffic.

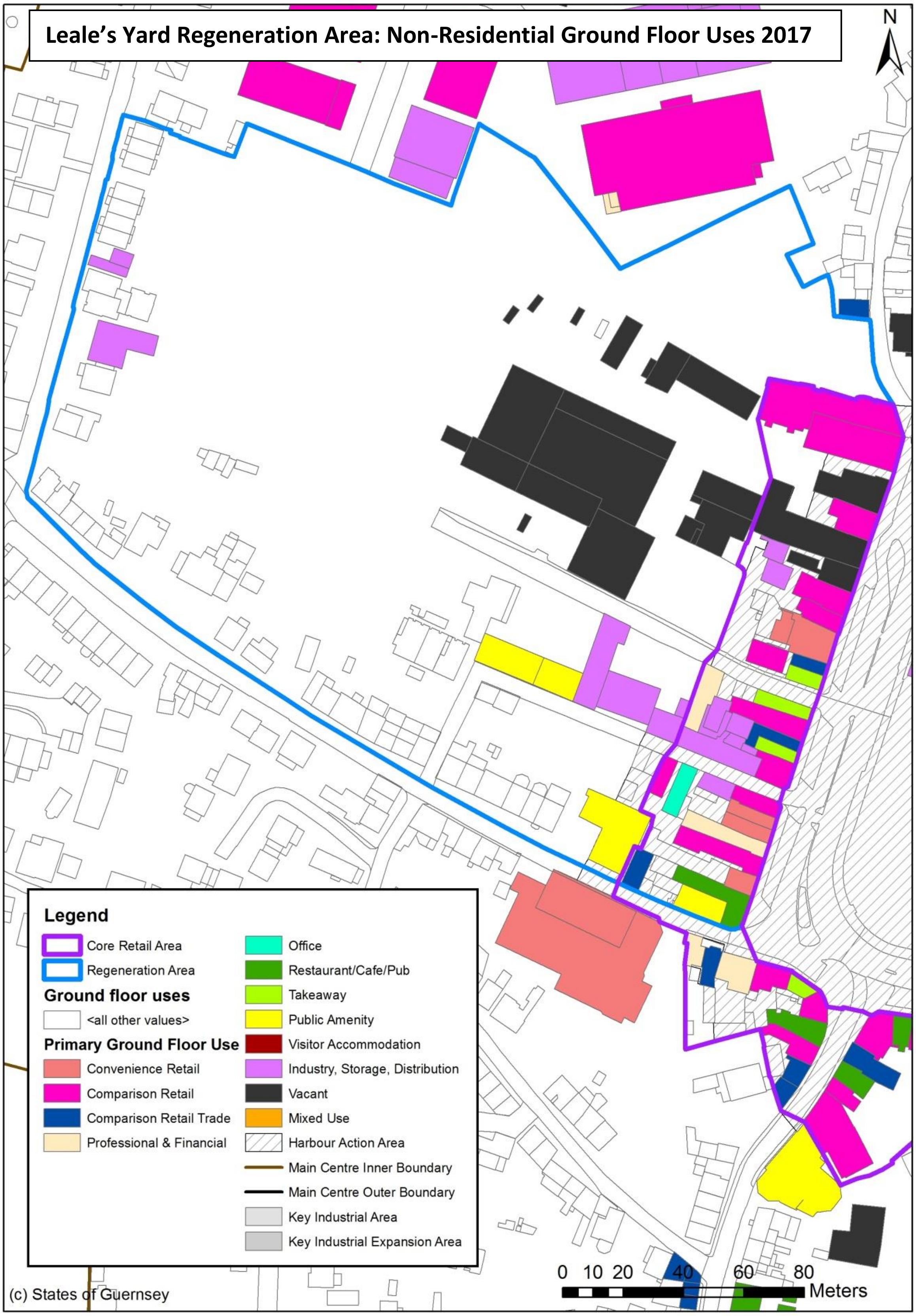
The 'Place Inventory' assessment of the physical public realm and the experience of using public space was carried out on within the Bridge Core Retail Area, focusing on the area from the Mariners Inn at the south to the GO Furniture store to the north and including the parking area. Consistent with comments from stakeholders, this highlighted the dominance of traffic and the lack of places to sit and spend time, detracting from the shopping experience. The environment had the potential to be attractive but the dominance of traffic reduced the visual appeal. This is consistent with the façade activation and building condition survey, which indicates the potential of the Core Retail Area to be an attractive shopping and leisure area.

Footfall counts were undertaken at two points (outside Boots the Chemist and outside Wayfarers Travel) and provide a limited snapshot in time. Further counts over time will ensure that the data is built up to provide more detail about how changes affect footfall over time. However, as described above, the counts undertaken on a Saturday were higher than those undertaken during the week, which differed from Town where footfalls were consistently higher during the week. Despite the presence of some bars and restaurants, the counts undertaken in the evening were very low, indicating a limited nigh-time economy, with the takeaways appearing to generate short visits by car

Leale's Yard Regeneration Area

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

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



Map 13: Leale's Yard Regeneration Area Ground Floor Uses 2017

The buildings shown in white are in residential use, so Map 13 shows quite clearly that residential uses line Lowlands Road and Nocq Road. Warehouses form the majority of buildings in the rest of the designation with retail and retail trades, takeaways and a pub along The Bridge frontage itself (also within the Core Retail Area).

Figure 19 below shows the ground floor uses in the Leale's Yard Regeneration Area by percentage.

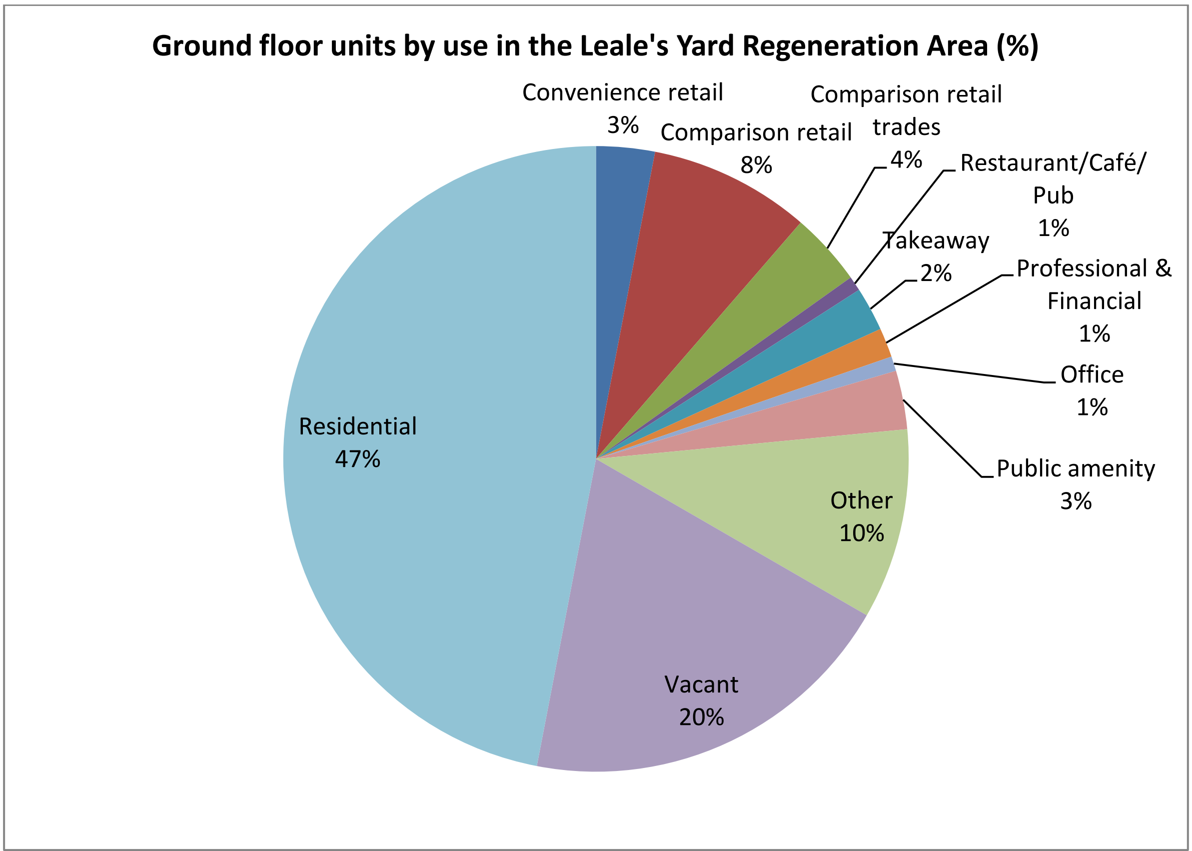


Figure 19: Ground floor units by use in the Leale's Yard Regeneration Area (%)

The vacancies noted in this area are already considered within the Core Retail Area section, and at the time of survey one was soon to become Costa coffee, another was under renovation and the third was the former Health Information Shop, which was in the process of moving premises. The 'Other' category refers primarily to the industrial/warehouse uses within the Regeneration Area. The high proportion of vacancies reflects the number of derelict buildings (approximately 11) within the inner part of Leale's Yard.

Figure 20 below shows the building condition within the Leale's Yard Regeneration Area.

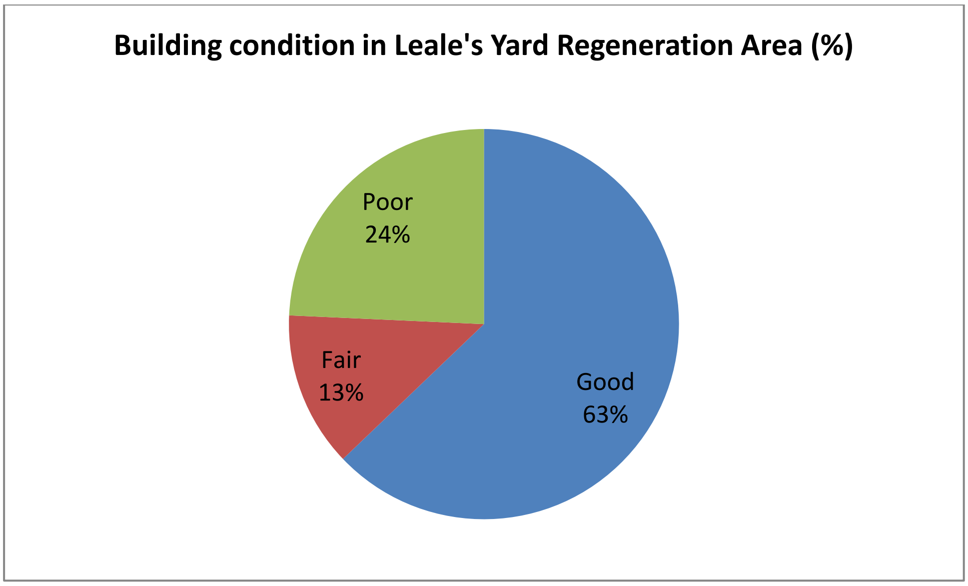


Figure 20: Building condition in Leale’s Yard Regeneration Area (%)

The buildings in ‘Poor’ condition are predominantly those behind the main frontage of The Bridge, and constitute various former warehouses and other structures which are derelict or in a poor state of repair. The residential properties are generally in ‘Good’ condition, as were most of the buildings that also fall within the Core Retail Area.

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

The Bridge Main Centre: Overall Summary and Conclusions

The Bridge continues to offer a complementary shopping experience to Town. The retail offer is different and includes bulky goods, such as from Homemaker or Regency bedding in the Main Centre Inner Area. There are clear opportunities for improvement and the Leale’s Yard Regeneration Area and St Sampson Harbour Action Area offer potential to attract inward investment and to improve the public realm and reduce the dominance of traffic at the Bridge, as well as reducing conflict between the different road users. Buildings within the Bridge Core Retail Area are of high quality and interest, and the higher footfall counts on Saturdays appears to indicate the local community, who perhaps work elsewhere in the week, shop at the Bridge on weekends, with less reliance on office workers than in Town. Improvements to the public realm to encourage greater dwell time could capitalise on this.

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

Overall Conclusions on the Main Centres

The main conclusion from the evidence presented is that both Main Centres appear to be in good condition, with many positive features and characteristics. There is scope for significant public realm improvements in both Main Centres, particularly within the Core Retail Areas, Harbour Action Areas and Regeneration Areas. Footfall counts appear to indicate that workers in Town increase weekday footfall, whilst at the Bridge Core Retail Area the footfall was higher during the Saturday counts. Evening footfall counts were reasonably low in all areas.

The quality of the individual buildings was generally high in both areas, although Town, in particular, due to the high level of planting, bunting and small historic shop units, is particularly attractive.

Both of the Main Centres would benefit from addressing conflict between road users, in particular the dominance of traffic at the Harbours which reduces the potential of the links between the retail areas and the waterfronts.

The Strategic Land Use Plan, as well as the Vision for St Peter Port and the Bridge, places an emphasis on improving the quality of the public realm in both of the Main Centres as a means to enhancing vitality and viability. Resolving the conflicts between traffic and pedestrians in key areas of Town and the Bridge could improve public realm and potentially increase dwell time in the Centres, contributing to their vitality and viability.

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

The 2017 research indicates that the Main Centres are performing as intended by the States in the Strategic Land Use Plan, with both providing facilities and services in accordance with the hierarchical structure of the spatial strategy, with St Peter Port retained as the primary retail centre.

Appendix 1: Research Tools and Techniques

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

	standard technique by Gehl Institute.	facades encourage people to slow down and offer visual stimulation, creating a reason to spend time on the street. This can encourage dwell time, supporting both vitality and viability. This assessment gives a broad indication of the quality of the facades in parts of the Core Retail Areas and Regeneration Areas, potentially highlighting areas for improvement that could enhance vitality and viability of the Main Centres.				
Place Inventory	On-site survey recording the quality of public realm using a standard technique by Gehl Institute. Includes an inventory of physical features and an assessment of the experience of using the public space.	Both the SLUP and the IDP emphasise the importance of public realm, which in itself is important for the economy as well as the environment and socially, encouraging dwell time and adding to the vitality of the Main Centres.	Y	Y	N	N
Footfall counts	On-site recording using a consistent technique, using locations within the Core Retail Areas and Regeneration Areas.	Given the emphasis on vitality of the Main Centres, footfall is recorded as a measure of this vitality.	Y	Y	N	N
Interviews with stakeholders	Interviews with a variety of stakeholders to inform data collection and add a qualitative element to evidence.	In depth interviews were used to inform data collection by identifying common themes which could then be researched. For example public realm has come out highly and it is intended to research this further in future years.	Y	Y	Y	N
Plotting data in GIS (Geographical Information System)	Inputting data into a mapping system to plot uses, opening hours, building condition, Goad data, vacancies and other information.	Identifies the spatial distribution of non-residential uses, opening hours, building condition, Goad data, vacancies and other information as appropriate and allows spatial patterns to be identified.	Y	Y	Y	Y

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

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