

# Main Centres Survey 2019

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States of Guernsey  
Planning Service



## Main Centres Survey 2019

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## Introduction

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

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

This Main Centres Survey 2019 reports on the 'health' of the two Main Centres, and forms part of the monitoring of planning policies as described above. The report is informed by research and surveys and includes the findings of an annual retail audit and building condition survey carried out in late August and early September 2019, as well as reporting on public realm, accessibility and other issues that relate to Main Centre policies.

## Policy Context

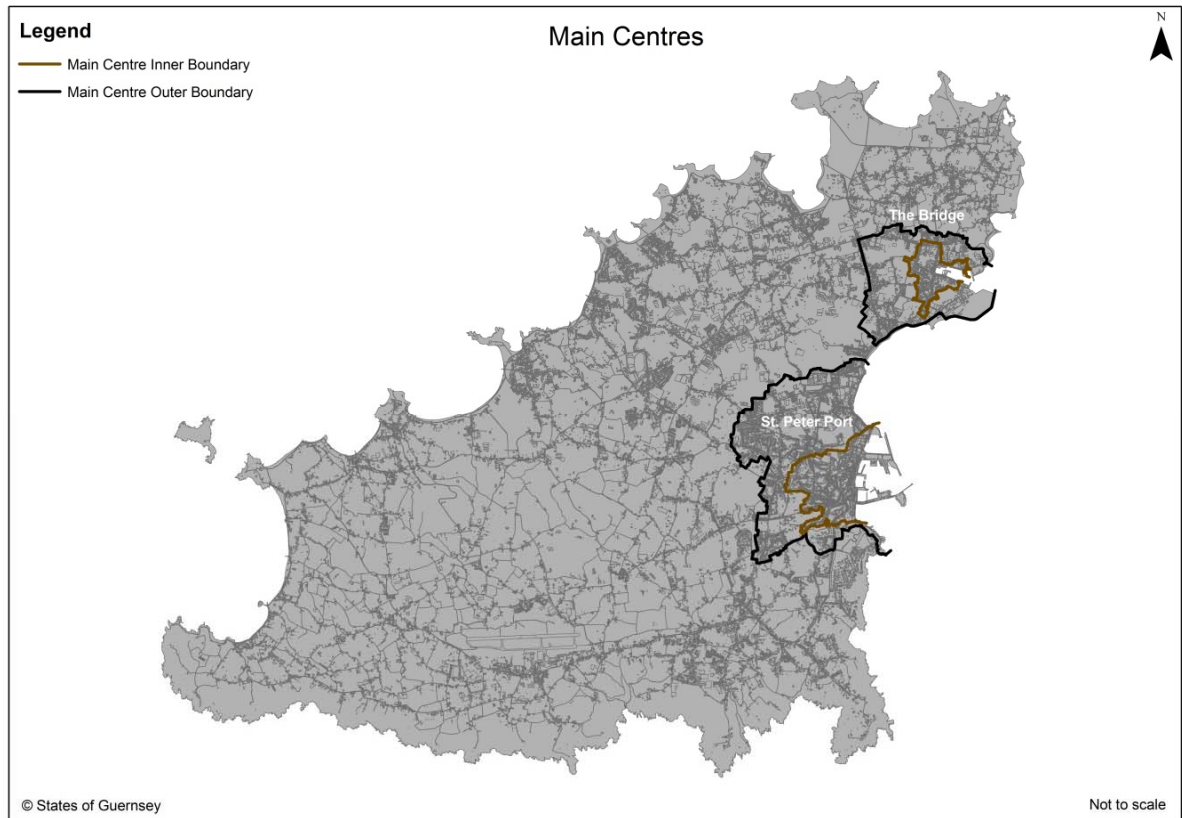
The SLUP, with which the IDP must be consistent, sets out the spatial strategy for the island which is to concentrate development within and around the edges of the urban centres of St Peter Port (Town) and St Sampson/Vale (the Bridge). The SLUP policies focus on enhancing vitality and viability of Town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

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

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

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



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

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:

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

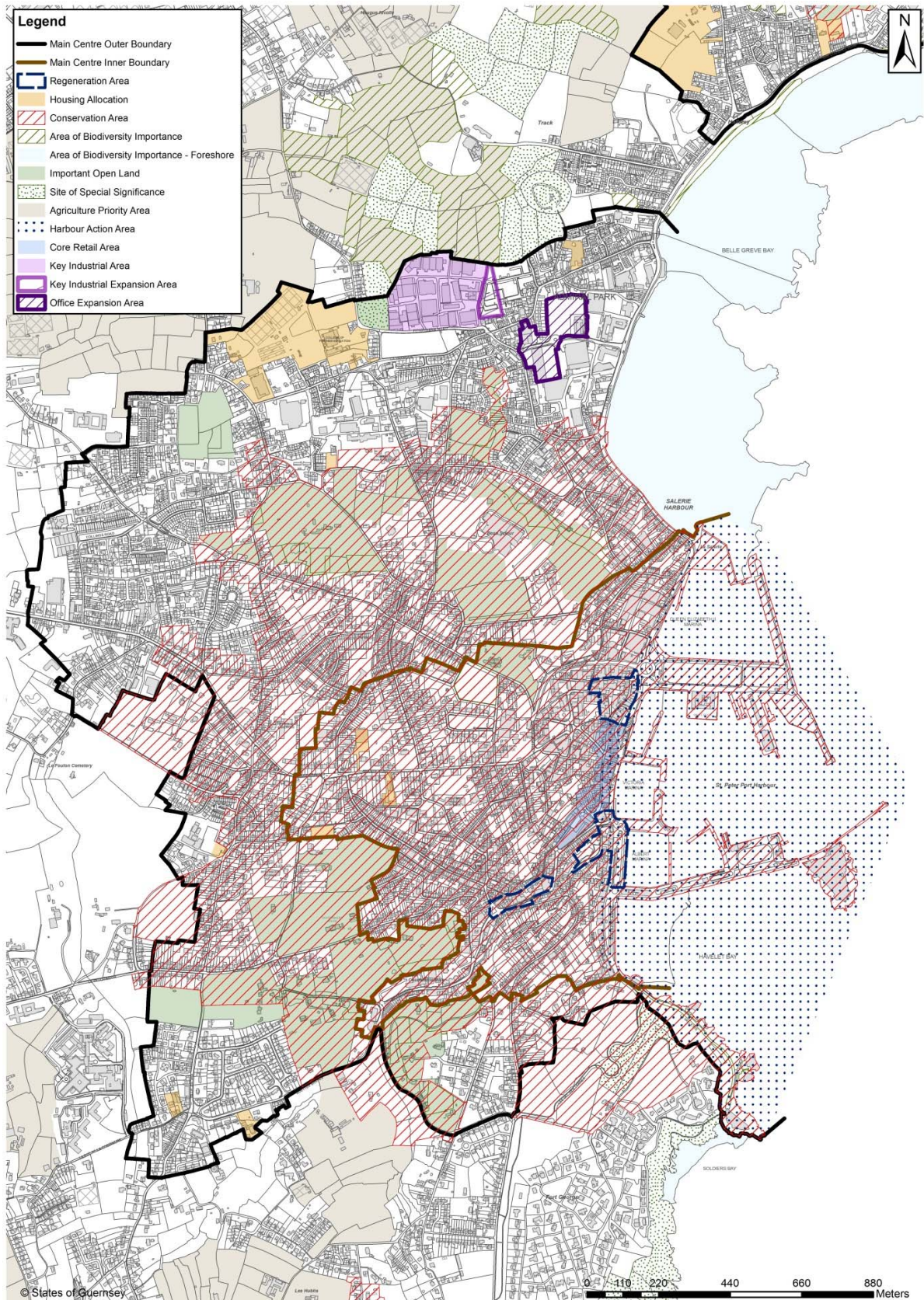
Other policy designations in the Main Centres and Main Centre Outer Areas include:

- **Housing Allocations** which are designated specifically for housing development and complementary facilities where appropriate.
- **Important Open Land** is designated as such as they provide breathing space within the built environment and in most cases offer views across undeveloped land. They have been recognised as important to protect in order to provide visual amenity, separation between settlements and prevent the potential wholesale development of the Main Centres and Main Centre Outer Areas.
- **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.

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.

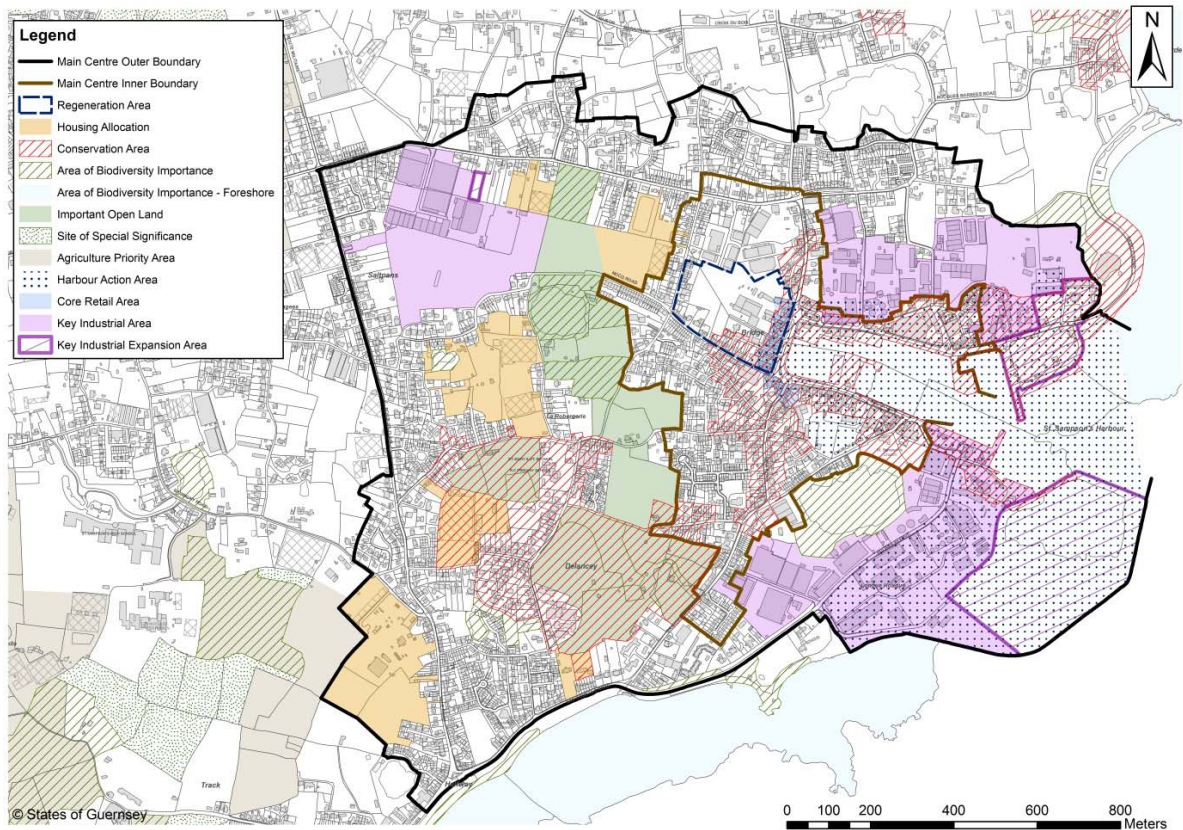
Maps 2 and 3 show the policy designations as defined in the IDP as they apply to both Town and the Bridge.





Map 2: Extract from the IDP Proposals Map showing the Main Centre policy designations relating to Town





Map 3: Extract from the IDP Proposals Map showing the Main Centre policy designations relating to the Bridge

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. Flexibility in the IDP policies allows those differences to be brought into the balance, for example what might contribute to the vitality of the Bridge might differ to what might contribute to the vitality of Town, depending on the existing diversity of uses or quality of the public realm, for example.

### Aims and Methodology

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

Methods used for this report are set out in full in [Appendix 1: Research Tools and Techniques](#), which describes the techniques used and illustrates which were applied to each policy designation. These research techniques can be summarised as follows:

- Use survey
- Goad categorisation
- Building condition survey
- Opening hours



- Façade activation<sup>2</sup>
- Public Realm survey<sup>3</sup>
- Footfall counts
- Stakeholder feedback
- Data mapping

Information in this report is by number of units rather than the number of occupiers unless otherwise stated (for example some occupiers may take up more than one unit, such as Burtons clothes shop in Town which occupies 3 units. Monitoring units rather than occupiers better represents the character of Guernsey's high street which is largely made up of smaller floorplate units but which can offer flexibility through amalgamation or subdivision.

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.

### **Main Centre Findings**

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

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

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

## Town (St Peter Port)

Town is the larger of the two Main Centres on the Island and includes the island's primary retail centre.

There have been many initiatives to increase the attractiveness of the island to tourists over the last year in an attempt to capitalise on the success of the novel and film 'Guernsey Literary & Potato Peel Pie Society', for which VisitGuernsey was shortlisted for two prestigious National Travel Marketing Awards. As a result, tours and activities have been developed which include showcasing some of the heritage assets of Town and the broader island. One of these initiatives is the Guernsey Occupation Trail which is composed of a series of information boards located across the island<sup>4</sup>, but including several within St Peter Port Main Centre.

In the first half of 2019 overall visitor numbers continued to grow, with almost 13,000 additional visitors entering Guernsey's shores, helped by a particularly strong cruise visitor market<sup>5</sup>. Whilst these potentially refer to the popularity of the island as a whole, they are relevant to (seasonal) vitality and viability of the Main Centres and of Town in particular.

### Town Accessibility

For the Main Centres to thrive, it is important that people can get to them easily and move around them easily. Accessibility is affected by congestion, availability/cost of car parking, public transport, availability of pedestrian and cycle infrastructure, as well as the topography and road surfacing, for example.

Town retains significant amounts of surface car parking and remains a centre for transport connections with the harbour, bus terminus and taxi rank. However there is no centralised transport hub within Town that accommodates all transport options and there are significant challenges relating to accessibility due to the conflicts between road users, topography of the High Street and the historic environment (e.g. road widths, uneven cobbled streets etc.)

Within the Main Centre Outer and Inner Areas, a number of road safety improvements were introduced in 2019 including the installation of an informal pedestrian crossing between Les Echelons/Havelet and South Esplanade, an extension of the footpath towards La Vallette and improvements such as dropped kerbs and tactile paving provided. Such changes can also benefit cyclists and other road users where road safety is improved more generally.

Works to improve accessibility include the re-surfacing and pedestrianisation of Market Street, changes to parking and taxi arrangements at Church Square, and changes to vehicle access at North Plantation. These are described in more detail in the Town Core Retail Area section of this report.

<sup>4</sup> <https://www.gov.gg/article/171355/New-Occupation-Trail-launches-across-the-Island>

<sup>5</sup> See Media Release here: [www.gov.gg/article/172875/Total-Visitor-numbers-up-8-year-to-date](https://www.gov.gg/article/172875/Total-Visitor-numbers-up-8-year-to-date)

A revised bus timetable began operation in April 2019 which included a number of changes intended to reduce pressure on certain scheduled bus routes on cruise ship days, plus additional evening services during the summer. Contactless payment technology has also been introduced on buses. Over the Christmas period, additional Night Owl services operated on late-night shopping evenings. In terms of bus use across the island, passenger journeys increased by 5.75% compared to 2018<sup>6</sup>. April 2019 also saw the introduction of new 25 mile per hour speed limits for ‘community hub’ areas, to broadly cover all Local Centres and Main Centre Outer Areas.

In December 2019, the Committee for the Environment & Infrastructure published a Policy Letter for debate in the States of Deliberation (scheduled for debate 5 February 2020), titled “The On-Island Integrated Transport Strategy – First Periodic Review”. This review acknowledges the access issues within St Peter Port (and St Sampson/Vale) and that they are a potential block to people with disabilities. Recent improvements are considered positive, but these improvements need to extend into the High Street and Le Pollet to have wider benefits. This is likely to present logistical challenges and there will be a balance between improving access and finding the right solution in terms of accessibility, cost, and heritage in what is a historically and culturally important area.

Public realm improvements can not only improve accessibility for all, but initiatives such as pedestrianisation or adding seating and greenery can increase footfall by up to 30% and retail turnover by an average of 17%<sup>7</sup>.

The Seafront Enhancement Area has provided an added impetus and political support for public realm improvements in Town. Potential initiatives include pedestrianisation of Church Square and the resurfacing of the High Street to improve accessibility.

A significant accessibility issue remains the separation of the harbour from the rest of Town by the heavy volumes of traffic along the seafront, leading to conflict between users and limitations on the use of outdoor space along the Quay. At the time of writing this report, there have been trial closures (to traffic) of the Quay, Lower Pollet and Church Square as part of the response to the coronavirus pandemic (i.e. these are measures to enable social distancing and al fresco dining). This will be reported further in the 2020 Main Centres Survey report.

### **Town Main Centre Inner and Main Centre Outer Areas**

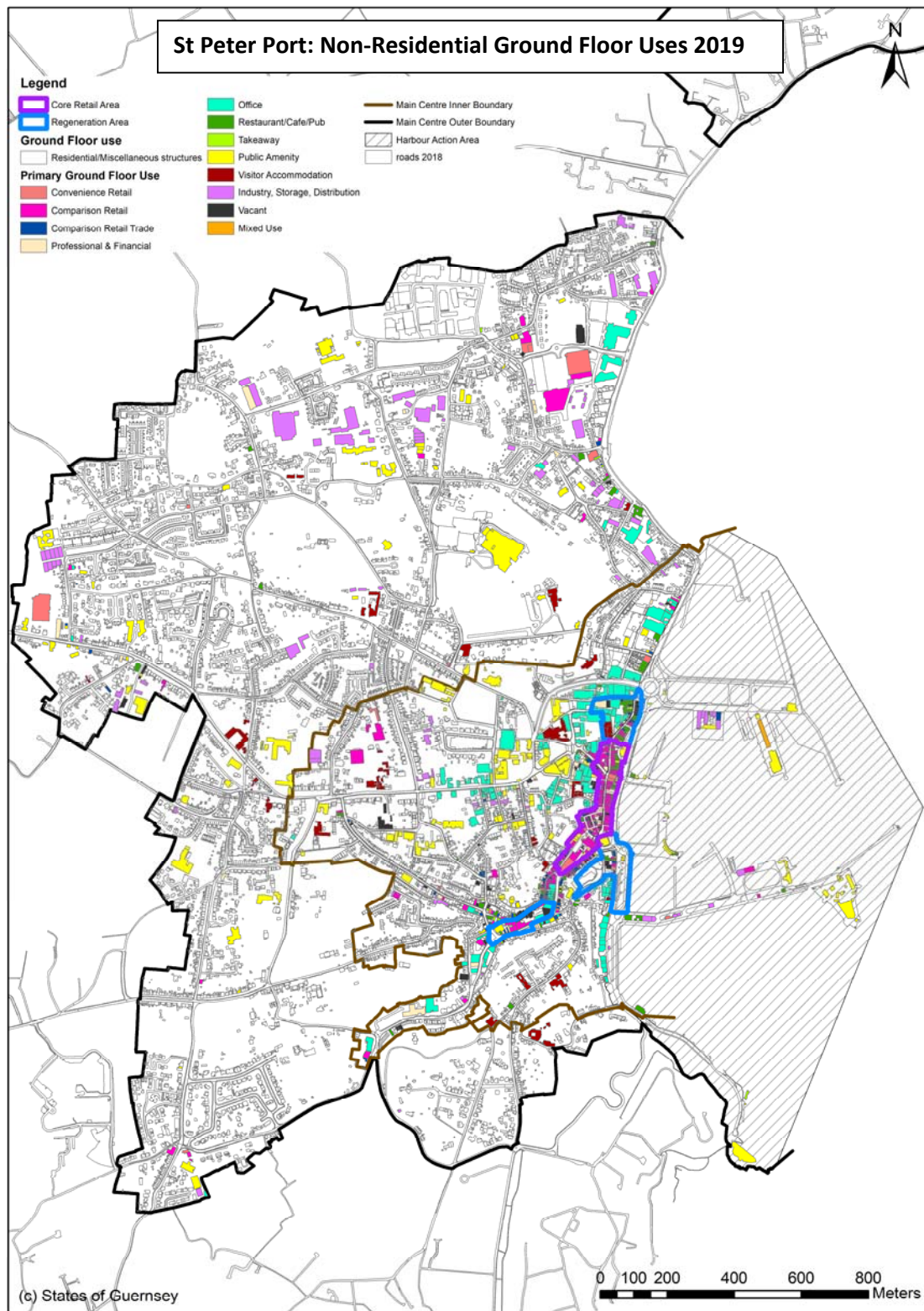
Using the 2018 data as a baseline, a desk-top survey was carried out for the Main Centre Inner and Main Centre Outer Areas to identify any additional buildings in non-residential use, or buildings that have changed out of non-residential use, and these buildings were subsequently surveyed on site to check their use and occupier. Buildings falling within the Key Industrial Areas and Key Industrial Expansion Areas were not assessed, as this will form part of a separate Employment Land Survey. **Map 4** below shows the spatial distribution of non-residential uses at ground floor within the St Peter Port Main Centre. *Please note that*

<sup>6</sup> <https://www.gov.gg/article/175997/2019-heralds-sixth-consecutive-annual-rise-in-bus-passenger-journeys>

<sup>7</sup> Whitehead, Tim, David Simmonds, and John Preston (2006) “The Effect of Urban Quality Improvements on Economic Activity.” *Journal of Environmental Management* 80 (1) (July): 1–12. doi:10.1016/j.jenvman.2005.01.029 in *Why Great Spaces Matter*, Association of Town & City Management.



*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.*



Map 4: Non-residential ground floor uses in Town Main Centre 2019

The Main Centre Outer Area is predominantly residential, with clusters of non-residential uses such as industrial uses around La Vrangue and office uses at Admiral Park in the northern part of the Main Centre Outer Area. Development is currently underway at Admiral Park which includes the construction of a Premier Inn Hotel. Two large supermarkets (Waitrose Admiral Park and Waitrose Rohais) are situated on the periphery of the Main Centre Outer Area, both on the northern side of St Peter Port.

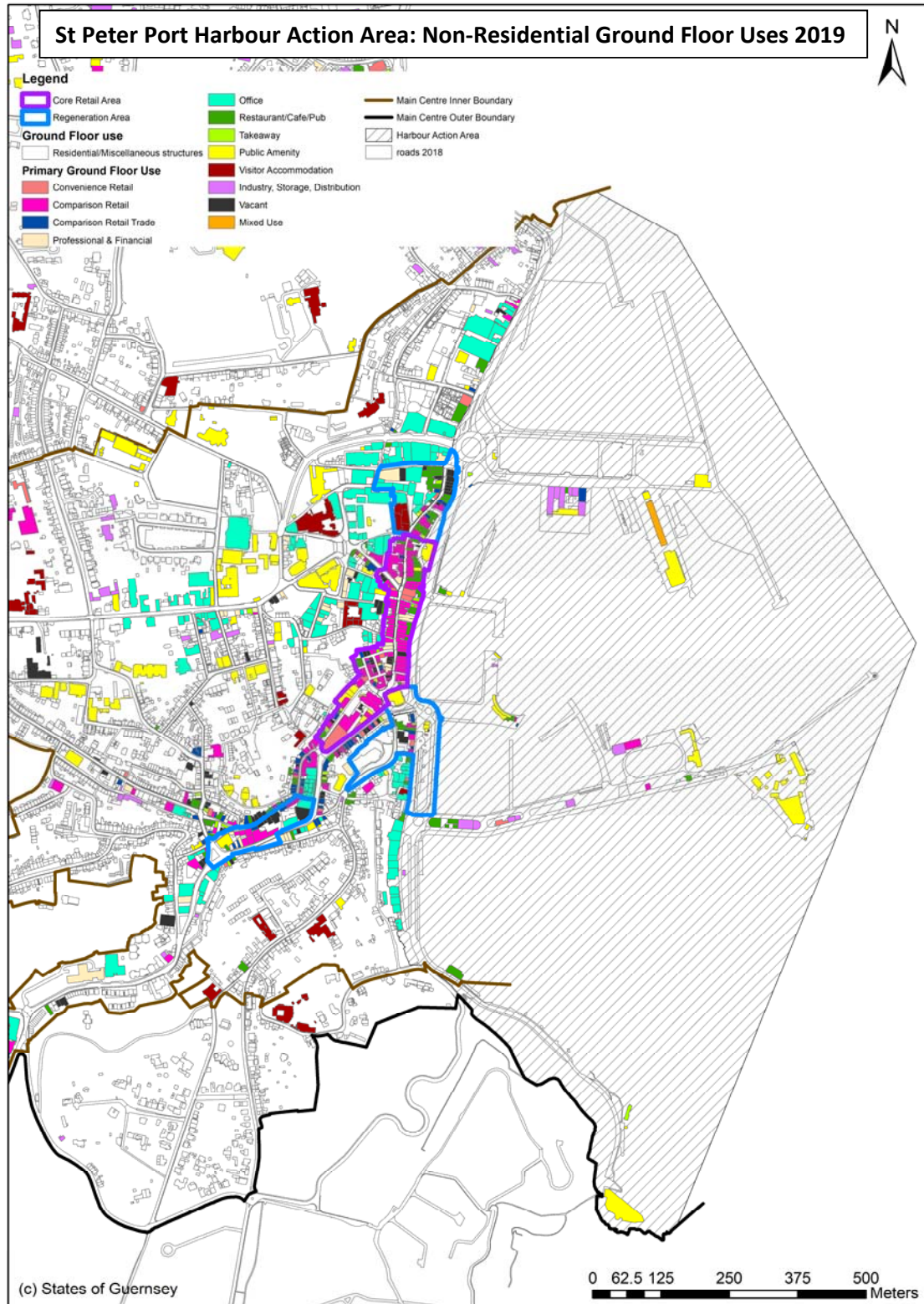
Along the inter-harbour route there is a variety of uses, including industrial, storage and distribution, office, retail, restaurants, cafes and pubs. Office uses line the main routes into Town towards the Core Retail Area (for example Rue de Pre, South Esplanade, The Grange and St Julian's Avenue). A variety of non-residential uses also line the piers within the Harbour Action Area (within the Main Centre Inner Area).

Public amenity uses such as schools, doctors, churches and leisure facilities are scattered throughout, with more concentrated public amenity uses within the Main Centre Inner Area, reflecting a higher density of users and the additional 'town centre' facilities such as the museum, library and courts. St James Concert & Assembly Hall and Beau Sejour both host various events including concerts and, in the case of Beau Sejour, film screenings. Visitor accommodation is currently focussed in and around the Main Centre Inner Area.

There are few open green spaces within Town, but Candie Gardens within the Main Centre Inner Area forms a high quality public open space on the periphery and to the north of Town. A smaller space closer to the Core Retail Area is St Paul's Garden on St James Street, which plays host to various temporary outdoor art exhibitions. In the Main Centre Outer Area, Cambridge Park, Beau Sejour and Les Cotils again offer high quality public open space, much of which falls within the Important Open Land designation. La Vallette and the cliff paths to the south of Town along the east coast provide additional public open spaces, but to the west, south west and north of Town beyond Beau Sejour, there are few publically accessible open green spaces within the Main Centre Outer and Inner Areas. As such opportunities for recreation and play are limited.

### **St Peter Port Harbour Action Area**

The St Peter Port Harbour Action Area 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 designation overlaps part of the Core Retail Area, Lower Pollet Regeneration Area and South Esplanade/Mignot Plateau Regeneration Area. The extent of the designation is shown below on [Map 5](#), along with the known non-residential uses in this area. 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 2019



In 2018 the 'See Potential' consultation<sup>8</sup> sought views on six sites where there may be opportunities to enhance the seafront as part of the Seafront Enhancement Area Programme and the Harbour Action Area Local Planning Brief. Following this consultation, shortlisted proposals and preferred bidders were announced in 2019 which included:

- 'Vive La Vallette' as the preferred bidder for two sites at La Vallette, with proposed improvements including a redeveloped kiosk, regeneration of the bathing pool facilities and a mixed use performance space;
- Joint preferred bidders for the Round Top Stores propose to provide space for sculptures from world renowned artists and host a new al fresco dining experience; and,
- Preferred bidder for the States Offices, which currently house the Tourist Information Centre, for proposals to possibly include a boutique hotel.

Since the 2019 survey was undertaken, the Aquarium at La Vallette permanently closed in October 2019, and in January 2020 the States of Guernsey sought expressions of interest for the site. At the time of writing this report, no proposals have been confirmed.

There was significant debate in the States of Deliberation in 2019 around harbour facilities, and the States Trading Supervisory Board (STSB) were directed to conduct a review of harbour operations in St Peter Port and St Sampson's to consider if new harbour facilities are required and what the best location would be for them. Some of the challenges being explored include the competition for space in St Peter Port, the way fuels are imported at St Sampson's, and how large private boats and super yachts can be catered for. The Environmental Impact Assessment will consider any likely effects on land and offshore, and how these might be mitigated, including traffic, marine life, coastal processes, noise and air quality.

Other changes in the Harbour Action Area include the improvements to the pavement and crossing points at Havelet/Les Echelons, La Vallette and South Esplanade, as well as restrictions to traffic at North Plantation. Major repairs were carried out at the Ladies Pool at La Vallette and the public toilets refurbished in 2019.

The harbour is of course a focal point for the islands fishing fleet, ferry services and leisure boating, as well as the associated facilities such as ticket offices, marina facilities, ferry terminal, storage areas and workshops.

Other significant uses within the Harbour Action Area include Castle Cornet, shops, restaurants, cafés and bars, as well as the bus terminus at South Esplanade and the main taxi rank at Lower Pollet. The harbour side of the Harbour Action Area remains dominated by traffic and parking which remains a significant challenge of the St Peter Port Harbour Action Area.

Accessibility of the public realm for pedestrians and non-car users is an ongoing issue, where traffic movement and car parking restrict the opportunities for enjoying the views

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<sup>8</sup> As part of the Seafront Enhancement Area programme, six States owned sites were the subject of public consultation to identify potential opportunities to enhance the St Peter Port seafront. For further information see <https://www.gov.gg/seafront>

across the harbour from The Quay and the piers, unless paying for a meal in a restaurant, for example. Public access therefore is a key issue, and the current Tourist Information Centre building and North Plantation may provide an opportunity in this regard. It is also worth noting that access to the public realm within the Harbour Action Area does not necessarily reflect the islands demographic or the needs of all users (for example children, people with disabilities etc.).

There are no focal points or public art within the HAA, such as attractive open spaces or places to congregate at the water side, with the exception of La Vallette to the south of Town. Proposals coming forward as part of the SEA may seek to address this amongst other issues, although it will be for the Harbour Action Area to address more comprehensively along with traffic and transport issues.

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

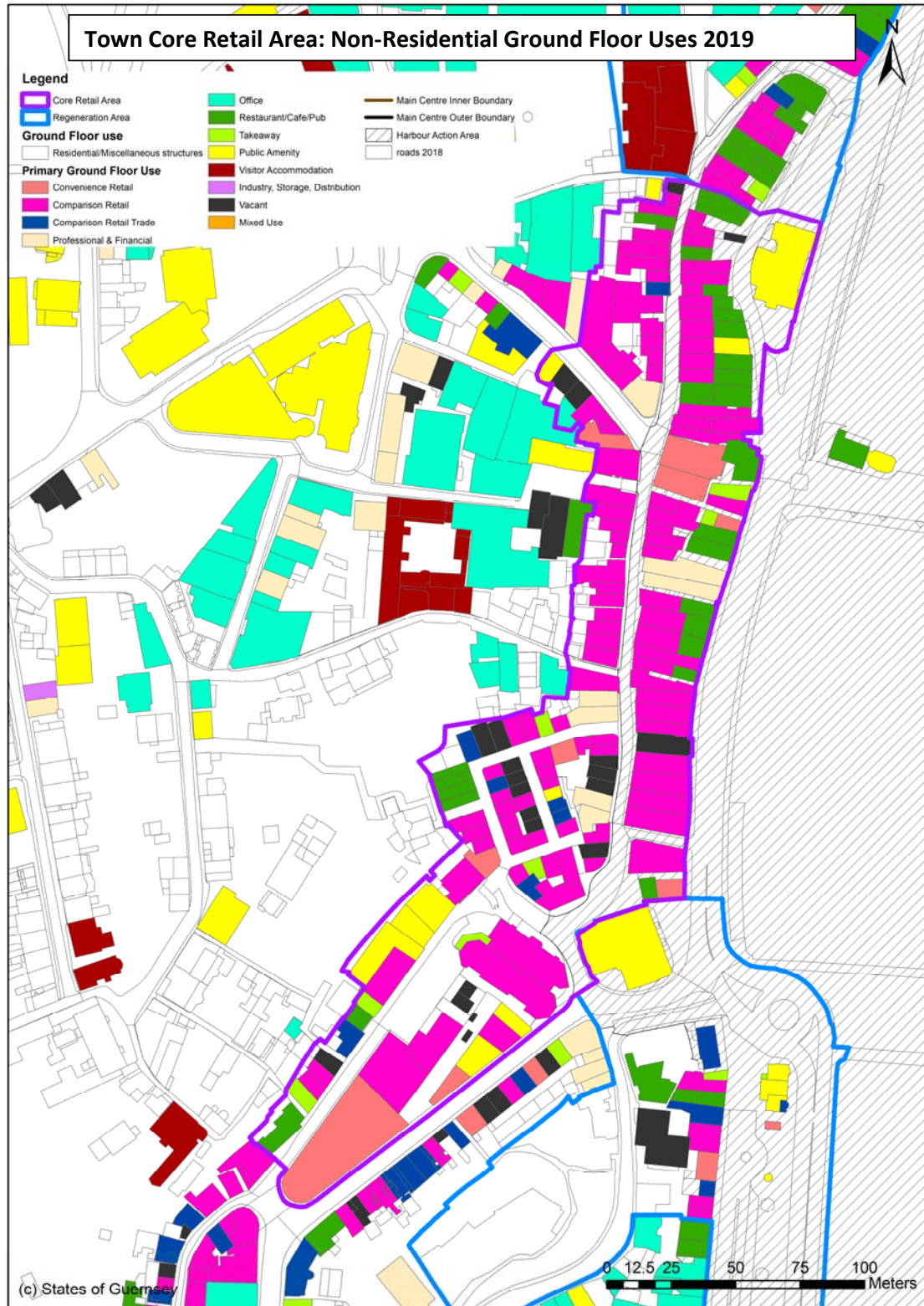
**Town Core Retail Area**

The Town Core Retail Area represents the primary shopping area of Guernsey. The Area is largely pedestrianised which creates a pleasant and safe environment for shopping, encouraging dwell time and prioritising the shopper over the car.

The Town Core Retail Area is clearly dominated by retail uses, with supporting uses such as banks and places to eat and drink. There is a particular concentration of restaurants, cafes and pubs around North Plantation, on the periphery of the Core Retail Area. The Guille-Allez Library and the Tourist Information Centre are the two main public amenity uses within the Core Retail Area, again on the edges of the designation.

**Map 6** shows the extent of the Core Retail Area designation, outlined in purple, and shows the ground floor uses recorded during the 2019 survey.





Map 6: Town Core Retail Area Ground Floor Uses 2019

### Ground Floor Uses

Figure 1 shows the breakdown of uses by unit in the Town Core Retail Area on the ground floor observed during the 2019 survey by percentage.

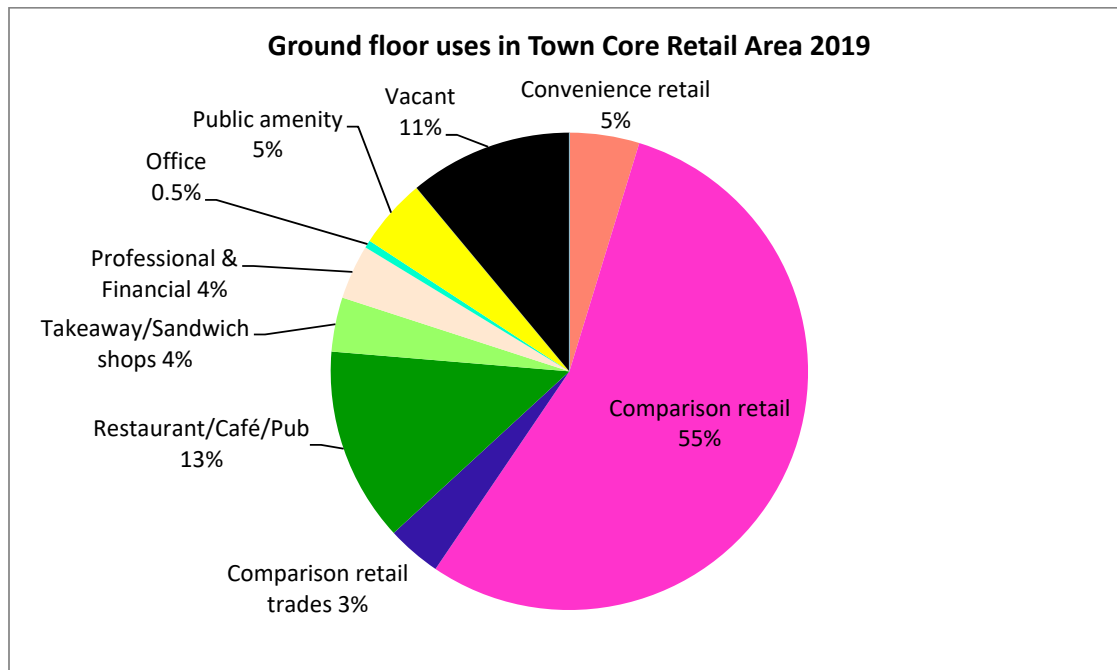


Figure 1: Percentage of ground floor units in each use within the Town Core Retail Area 2019

The retail function, including retail trades such as hairdressers and cobblers, accounts for 63% of the units in the Town Core Retail Area, which is a lower proportion than recorded in 2018 (69%) and 2017 (68%) but overall represents a difference of 7 units since 2018. The percentage of convenience retail units has remained constant since 2017 at 5%.

The number of vacancies recorded had increased again this year, 11% in 2019 compared to 9% and 5% in 2018 and 2017 respectively. Of the 21 units that were recorded as vacant, 2 were new units (within the Inner Market Street development), which have since been filled (firstly by Simply Vegan & Vegetarian café, and more recently by The Streat). 7 of the vacant units were undergoing renovation or refurbishment at the time of survey which is a positive sign of investment.

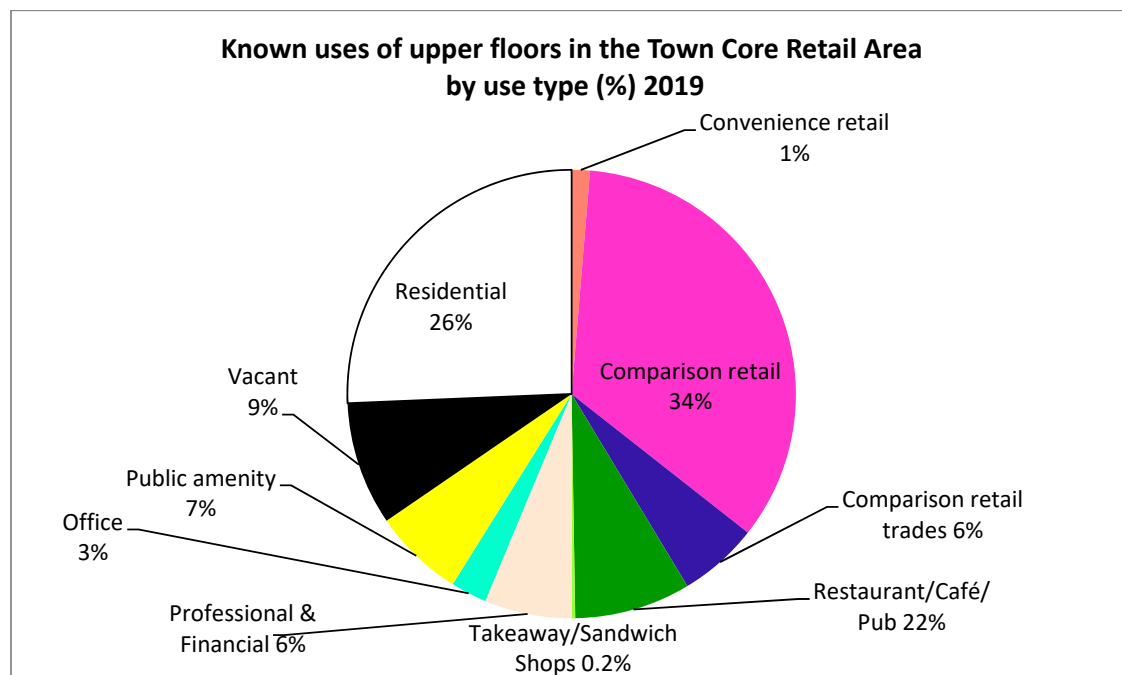
The majority of vacant units (16 out of 21 units) had previously been in comparison retail use, including Podgers, the former Press Shop, Beghins, Miss Selfridge and Sail or Surf. Two vacant units had previously been in café/restaurant use, and one unit was formerly an office (HSBC Premier). It is also worth noting that some of the retail occupiers used more than one unit, for example, the Press Shop occupied two units, whilst Beghins occupied three units. Therefore the number of vacant 'units' in this report is higher than the number of vacant 'shops'.

As observed in the 2018 survey report, some units appear to be re-occupied quickly, whilst others have remained vacant for longer periods of time. At the time of writing this report,

planning permission has been granted for a takeaway at the former Podgers unit, Trespass have occupied the former Miss Selfridge Unit, the Pickle Pad is now Panache hairdressers and the Market Street Jewellers has re-opened as Chefan (a burger bar). However several other units continue to remain vacant, including the former Beghins units and the Press Shop units.

### Upper floor uses

Upper floor data is collected both through on-site survey and desk-based information collection (for example TRP records and planning application history). **Figure 2** shows the use of upper floors in the Core Retail Area by type where the use is known. The upper floor use is often complementary to the ground floor, so for example there is a significant proportion of comparison retail on upper floors, which includes floor space open to customers as well as floor space dedicated to ancillary storage.



**Figure 2: Percentage of upper floor units in different uses within the Town Core Retail Area where known, 2019**

The upper floor data is being improved each year and because of this, comparison with the 2017 and 2018 data should be treated with caution. However, the percentages remain broadly comparable with the 2017 and 2018 data, for example the number of restaurants/cafés/pubs has remained at 22% over the three years, and public amenity at 6-7%.

### Footfall

In common with the footfall data from both 2017 and 2018, the footfall counts were higher in the Town Core Retail Area than any other areas surveyed. Within this area, the lunchtime counts were generally the highest, and evening counts the lowest. This is likely to reflect both the timing of the counts and the daytime retail function of the Core Retail Area. The

daytime counts were noted to include a large number of tourists from visiting cruise ships so count data is likely to vary significantly according to season.

In contrast to some other areas of Town (for example Le Pollet), many people slowly amble along the High Street, window shopping and photographing the buildings, rather than just rushing through – i.e. the dwell time here is longer than in other areas of Town.

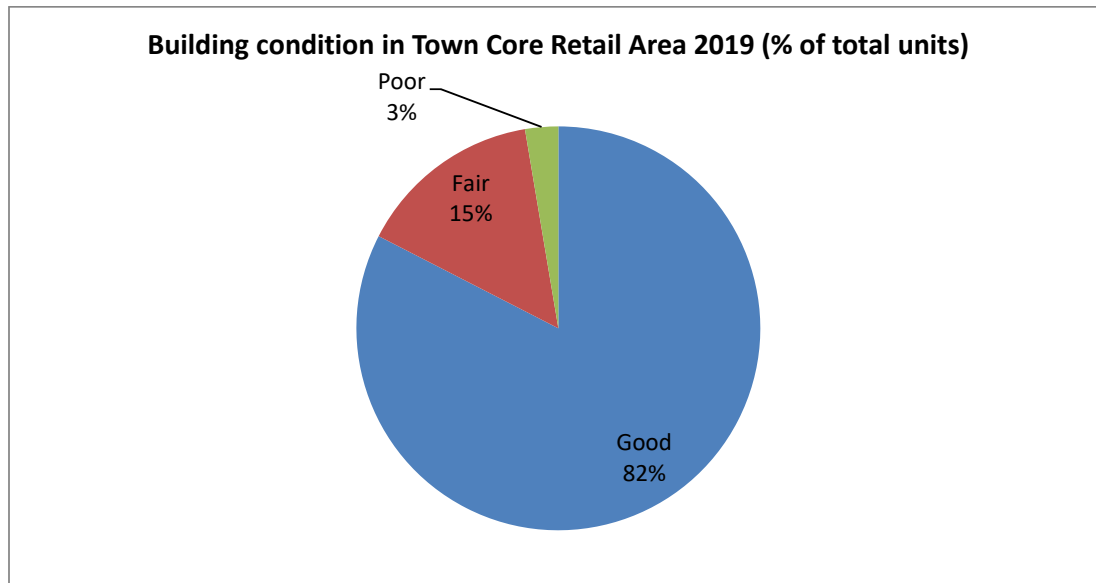
#### Opening Hours

Of the units in the Core Retail Area where opening hours are known, including upper floors as well as ground floors, approximately 16% are open after 5pm and 12% are open on Sundays. This is similar to the findings in previous years with a very slight increase, possibly due to improved data. These units are predominantly restaurants, cafes, pubs and bars which are uses that traditionally support the evening economy. Few shops in the Core Retail Area appear to open on Sundays or after 5pm.

Since the survey was undertaken, the library has extended opening hours two nights a week as 'Late Night Library', adding to the diversity of the evening economy.

#### Building condition

The environmental quality of Town Core Retail Area is kept to a high standard and the figures show a relatively static picture, with no change in the number of units considered to be in 'good' condition. However there was an increase in the number of units assessed as 'poor', rising from 0.5% (or 1 unit) in 2018 to 3% (or 5 units) in 2019 (see [Figure 3](#) below).



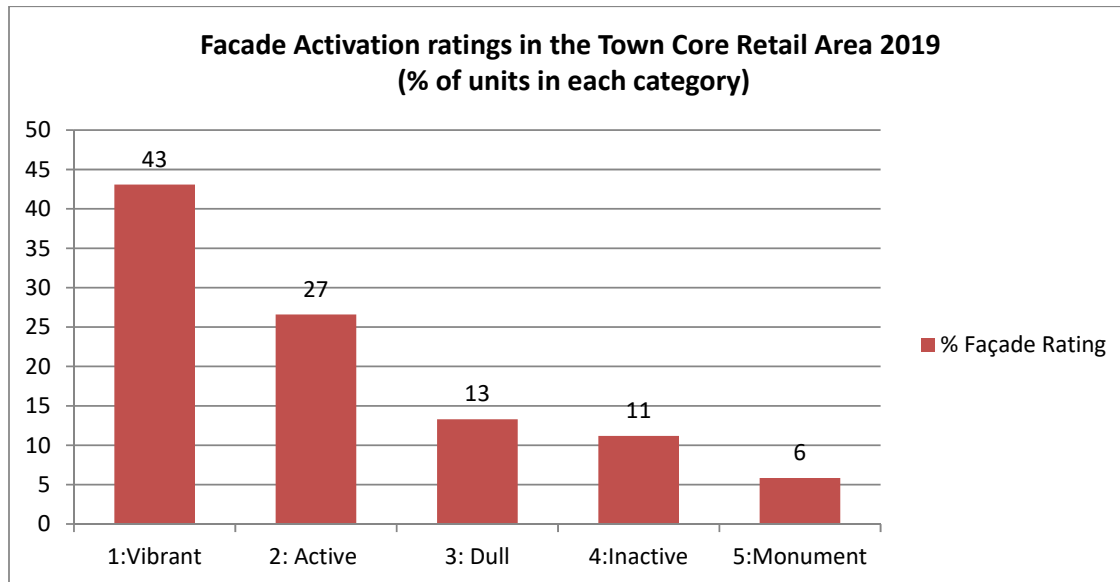
**Figure 3: Building condition in Town Core Retail Area 2019**

Of the 5 units that were rated as poor, 2 were vacant. In addition to the condition survey, it was noted that 9 units were undergoing renovation or refurbishment at the time of survey. 7 of these were vacant, the 2 occupied units were rated either fair or poor.

### Façade Activation

The Façade Activation study involves rating buildings according to their interest. High levels of interest and detail encourage shoppers to increase their 'dwell time' – that is, taking more time in an area rather than rushing through. From observations undertaken during the footfall counts it is quite clear that in some areas of Town people are more likely to rush through than in other areas, and the attractiveness of the environment is a contributor to this.

The façade activation results are shown in [Figure 4](#).



**Figure 4: Façade Activation ratings within the Core Retail Area 2019**

The Guernsey high street has retained a high level of historic detailing and interest in the retail units. An increase in the number of 'inactive' units reflects the rise in vacancies since 2018. Category 5: Monument refers to units that are historic or artistic, that are visually remarkable but not very active or transparent. The Market Building (Co-Op), Tourist Information and two pubs were included in this category and it remains unchanged since 2018.

### Public Realm

The Core Retail Area is largely pedestrianised which provides a safe and attractive environment for shoppers. At the time of survey and as a general observation, there was little or no graffiti and minimal littering, with the exception of cigarette ends.

Town Church Square has high volumes of pedestrians passing through as it marks a principle entry point to the main shopping area and is where several crossing points converge on the eastern side. 2019 saw the removal of short-stay car parking in Church Square which were replaced by spaces for taxis.

Market Square is an attractive space, large enough to allow for markets and events and forms a focal point during various festivals, for example the Literary Festival, Town Carnival



etc. Works have been completed to the Inner Market where tables and seating are well used. However the seating is not necessarily suitable for young children, elderly or disabled people, being high level without arms or back rests and which swing. Nonetheless the Inner Street is visibly more active day to day.

To the south of Market Square, works to enhance Market Street were completed in summer 2019, which involved the resurfacing on Market Street and surrounding area, to improve pedestrian safety, provide a link to the Old Quarter and increase the overall accessibility of the area. The level granite surface enables easier access for people using wheelchairs and pushchairs, as well as providing for outdoor seating. Feedback on the scheme has been positive<sup>9</sup>.

At the northern end of the Core Retail Area, trial changes were made to access at North Plantation to provide a safer area for shoppers and to provide more space for outdoor eating and drinking. Feedback has again been positive and permanent changes to traffic access have now been introduced, which further changes such as resurfacing are considered for the future as part of the Seafront Enhancement Area project.

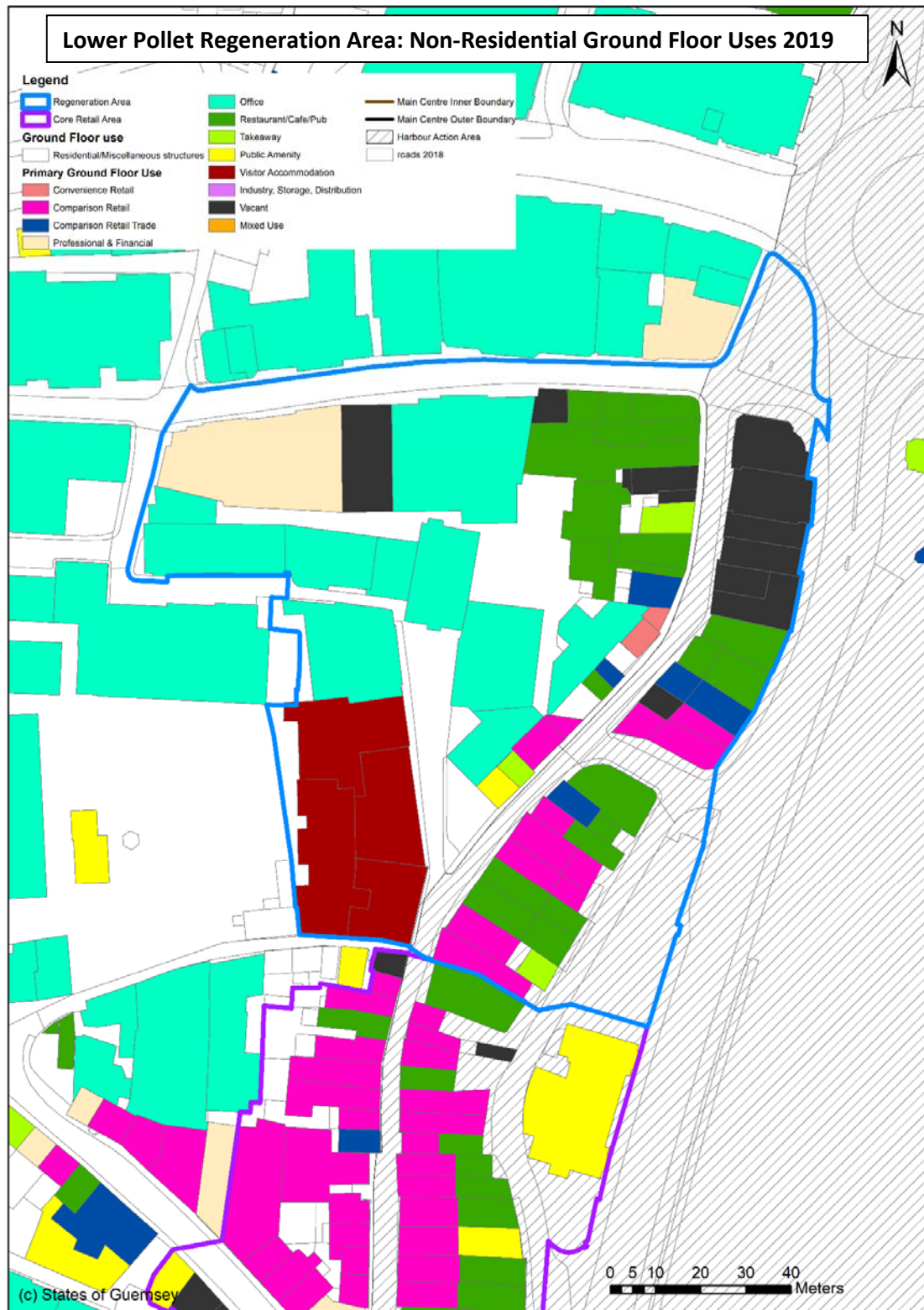
As noted, trials have also taken place closing parts of Town to traffic to enable al fresco dining, e.g. along the Quay.

### **Lower Pollet Regeneration Area**

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

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<sup>9</sup> <https://www.gov.gg/article/172343/Completion-of-resurfacing-project-enhances-vibrancy-and-appeal-of-Market-Street-and-its-surrounding-area>



Map 7: Lower Pollet Regeneration Area Ground Floor Uses 2019

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

transition away from the Core Retail Area. There is a high proportion of offices in Le Truchot and La Plaiderie, and Moores Hotel also has a prominent position within the Regeneration Area. The vacant units are mainly clustered at the northern end of the Regeneration Area, which include The White Hart and The Lower Pollet Food Hall, both of which were undergoing renovation at the time of the survey.

#### Ground floor uses

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

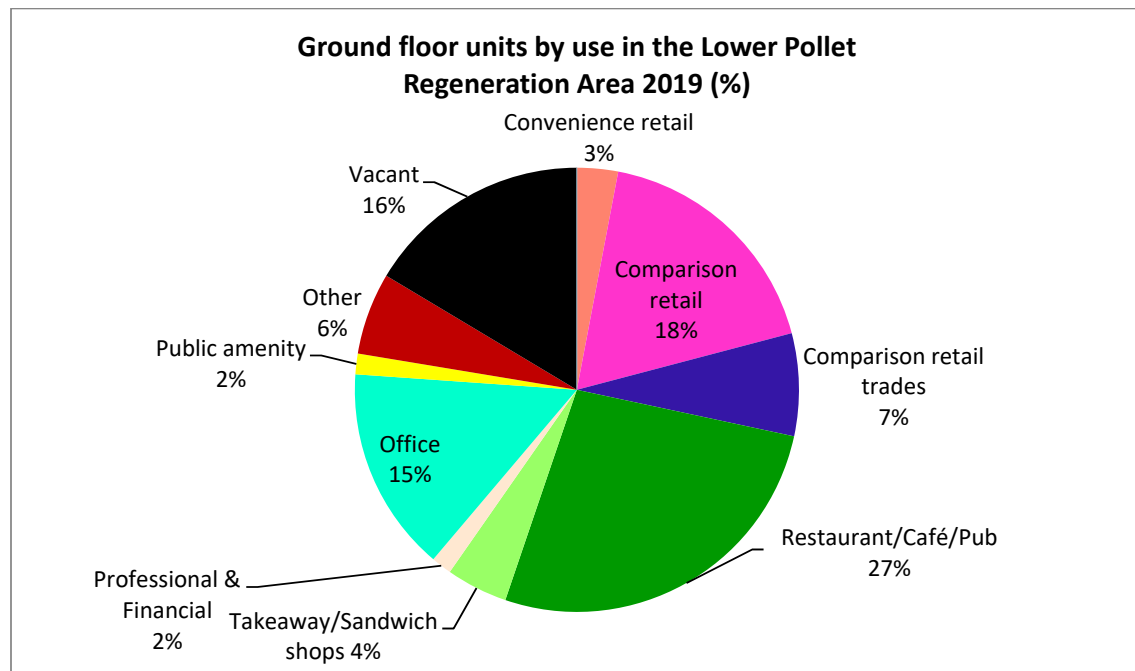


Figure 5: Ground floor units by use in the Lower Pollet Regeneration Area 2019

There has been an increase in vacant units and a decrease in convenience retail, comparison retail trades and restaurants/cafes/and pubs. Vacancies have risen from 3% in 2017 to 16% in 2019 (2 units in 2017 compared to 11 vacant units in 2019).

Part of the reason for the increased number in 2019 is the renovation of the White Hart and Lower Pollet Food Hall – these account for 4 units in total, and their renovation indicates investment. Several of the remaining vacant units have been empty for some time (for example the retail units formerly Miss Nob and Urban G). The 'Other' uses in this case represent the units which together form Moores Hotel, and incorporates the hotel, The Conservatory Restaurant, J.B. Parker's Bar and the Hideaway Patisserie.

Overall this data indicates both decline (a continued increase in vacancies) and investment (the renovation of The White Hart and Lower Pollet Food Hall).

#### Upper floor uses

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

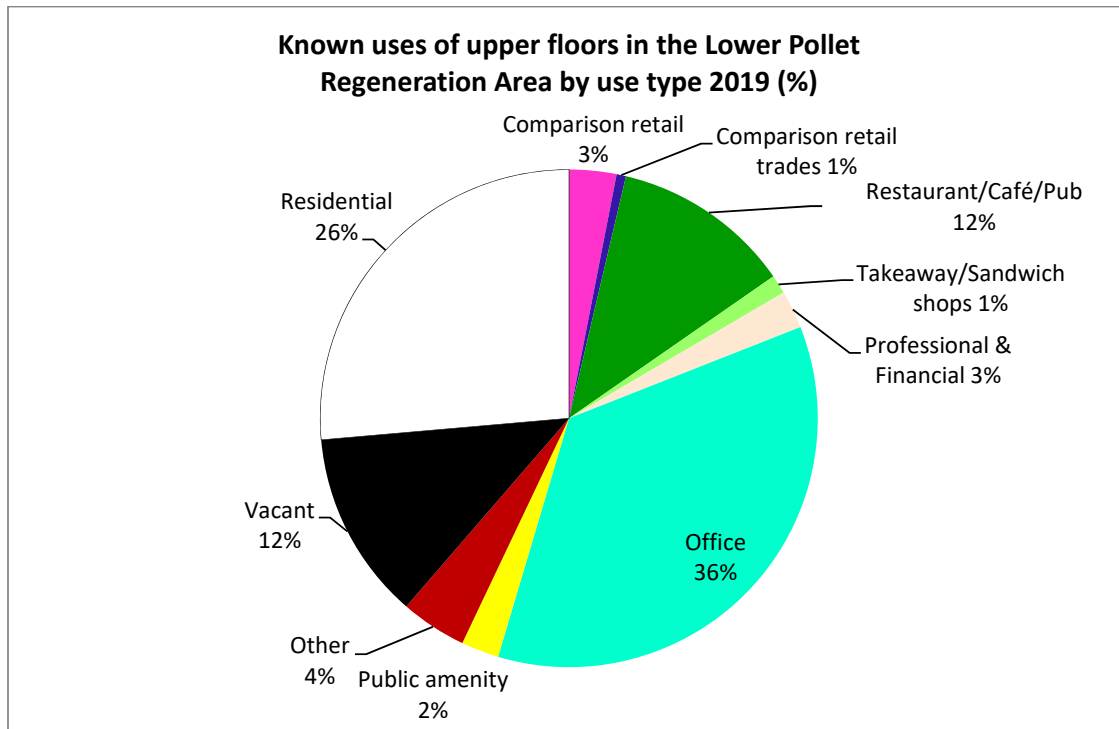


Figure 6: Percentage of upper floor units in different uses within the Lower Pollet Regeneration Area, where known, 2019

Office and residential uses remain the primary uses on upper floors in this area. 12% of upper floors were in Restaurant/Café/Pub use, and a further 12% were recorded as vacant.

#### Footfall Counts and Opening Hours

As in 2017 and 2018, the weekday lunchtime footfall counts were the highest, with noticeably lower lunchtime counts on a Saturday suggesting that office workers add considerably to the footfall counts in this location. Also noticeable from observations is the amount of people hurrying through the area during the day in contrast to behaviour on the High Street. This is most likely a result of the less attractive environment in this location.

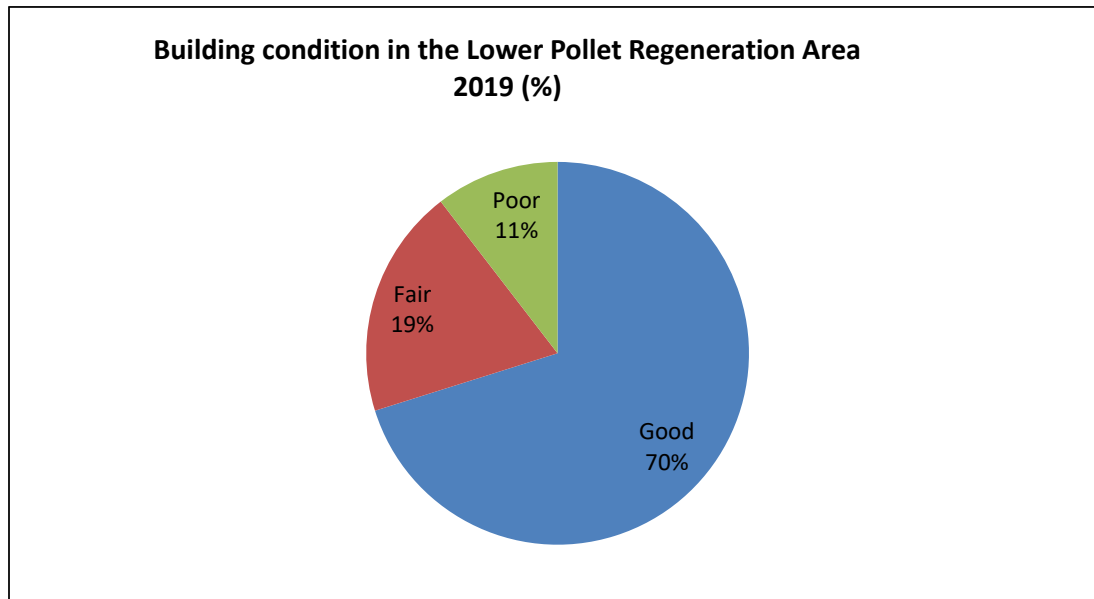
The evening footfall count on Friday was the highest of all of the evening counts undertaken, most likely a reflection of the many units with extended opening hours in the Lower Pollet Regeneration Area. Approximately 42% of ground floor units where the opening hours are known are open after 5pm, and 45% of ground floor units were also open on Sundays – both of these percentages are significantly higher than in the Town Core Retail Area. The majority of the units with extended opening hours are restaurants/cafes/pubs and bars, but there are also hairdressers, beauticians, convenience and gift shops with extended opening hours, representing a more diverse evening/Sunday economy compared to the Core Retail Area.

#### Building Condition

Building conditions remained similar to previous years, although there has been an increase in the number of buildings considered to be in good or poor condition and a corresponding



decrease in those rated as fair. Six of the 7 units rated as poor were vacant (2 were undergoing renovation). **Figure 7** shows the relevant percentages.

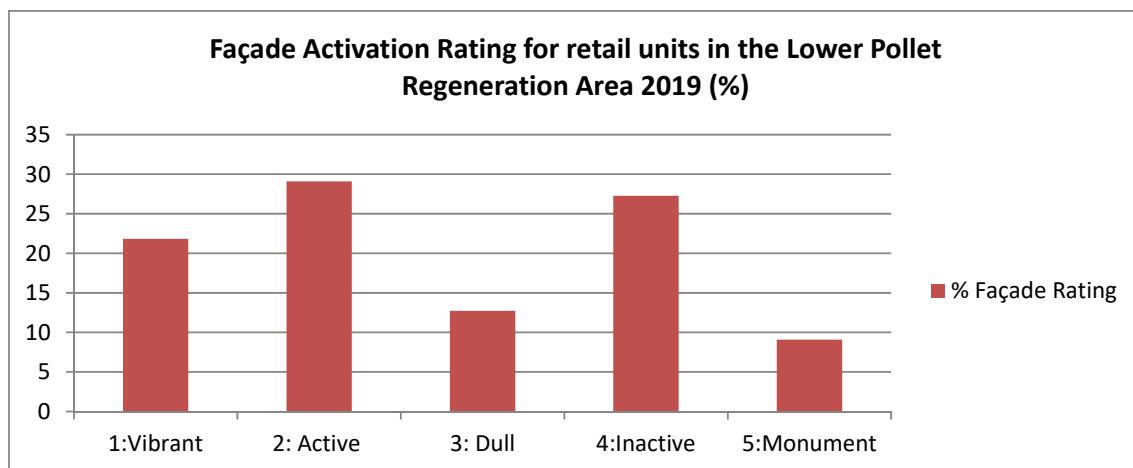


**Figure 7: Building condition in Lower Pollet Regeneration Area 2019**

#### Façade Activation

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

The façade activation ratings were not as high as within the Core Retail Area, and included a significant proportion of 'inactive' buildings – these were mainly vacancies but also included nightclubs and other units which lacked transparency. The units in this area continue to be rated relatively highly as many are small, transparent and have interesting detail, though the overall impression of the Regeneration Area is reduced due to traffic impacts. **Figure 8** shows the results of the survey.



**Figure 8: Façade activation ratings in the Lower Pollet Regeneration Area 2019.**

### Public Realm

There is potential to improve the public realm at the Lower Pollet where currently the space is dominated by the impacts of traffic including exhaust fumes, noise, and conflicts between users. This would need to be part of the comprehensive planning of the area though may be addressed through Development Frameworks for the Regeneration Areas.

Falling partly within the Core Retail Area and partly within the Lower Pollet Regeneration Area, changes were trialled in 2019 and subsequently made permanent in 2020 at North Plantation providing a safer area for shoppers and more space for outdoor eating and drinking. Further changes such as resurfacing will be considered in the future as part of the Seafront Enhancement Area project. The landscaped area of North Plantation is one of few publicly accessible green spaces in the town area and as such is well used, particularly during events such as Seafront Sunday, but also informally by people waiting for the bus or to sit and eat lunch. The attractiveness of the space is impacted by the dominance of traffic along the seafront.

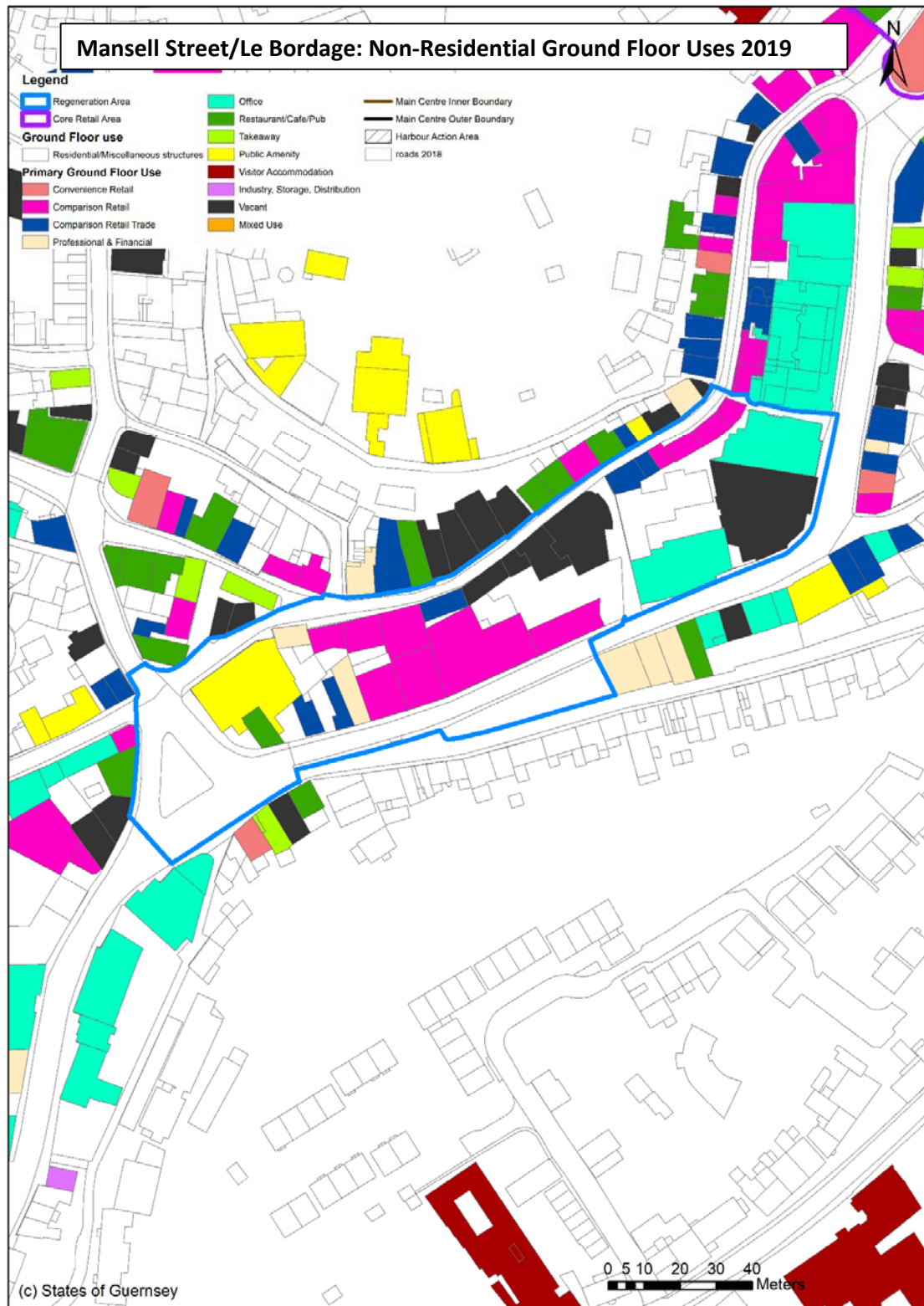
The pleasant area of public realm at La Plaiderie could offer further opportunities in the future depending on the mix of uses and sharing of space between cars and pedestrians.

The other area of 'open space' within the Lower Pollet Regeneration Area is the taxi rank, which is not a particularly attractive space and which is dominated by traffic and hard landscaping.

There are significant opportunities to improve the environment and potentially create areas for people to enjoy an improved public realm, which can be a successful catalyst for economic investment in itself, e.g. North Plantation, Lower Pollet and La Plaiderie. The prevalence of offices adds to the lunchtime vitality and viability of both the Regeneration Area and the Core Retail Area, and the highest evening footfall counts reflect the role of this area in the evening and night-time economy.

### **Mansell Street/Le Bordage Regeneration Area**

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



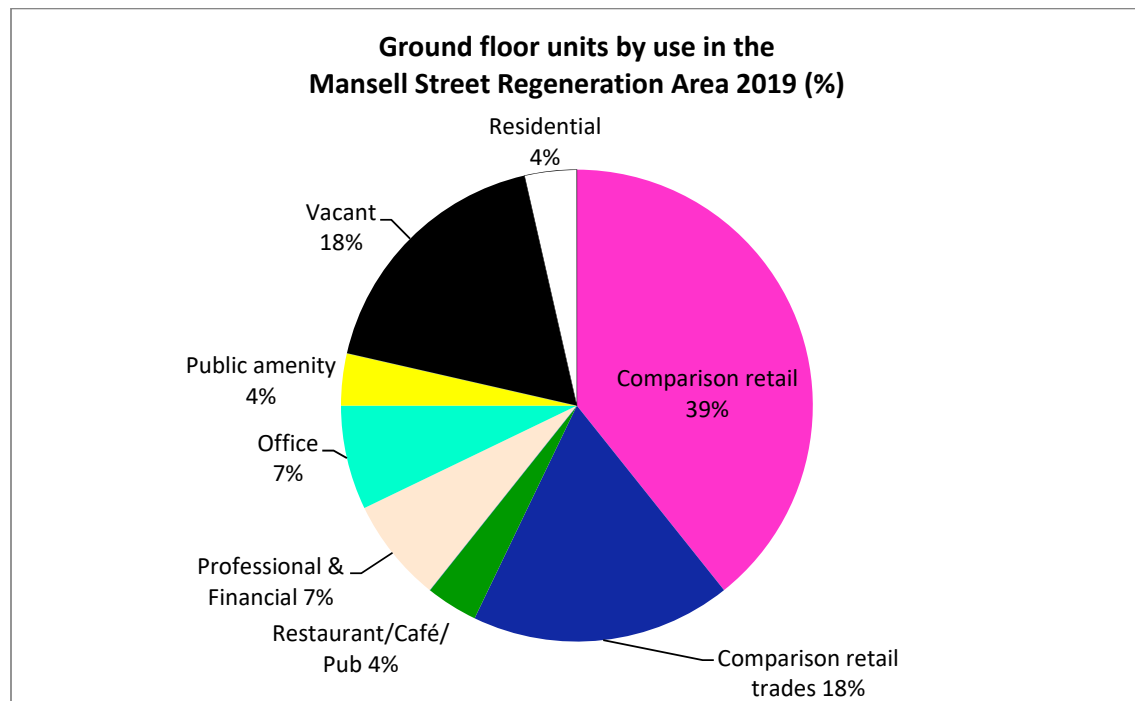
Map 8: Mansell Street/Le Bordage Regeneration Area 2019

There is a cluster of offices at ground floor level at the eastern end of the Regeneration Area fronting Le Bordage. At the time of survey one of these, St Andrew's House, was vacant but

has since been occupied by Agilisys. A group of comparison retail units lies within in the centre of the Regeneration Area with frontages on Mansell Street and on Le Bordage (Ideal Furnishings). Trinity Church forms a focal point at the top of Mansell Street and incorporates a small café.

#### Ground floor uses

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



**Figure 9: Ground floor units by use in the Mansell Street/Le Bordage Regeneration Area 2019**

There has been a slight reduction in the number of comparison retail units and a corresponding increase in vacancies. There is a total of 5 vacant units within the Regeneration Area, four of which were previously in retail use. Since the time of survey, a number of the vacant units have since been re-let, including St Andrews House as noted.

The northern side of Mansell Street/Mills Street falls outside of the Regeneration Area and also contains a number of vacant units. These are not included in the percentages above but give a visual impression of an area that is, at least in part, run down.

#### Upper floor uses

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



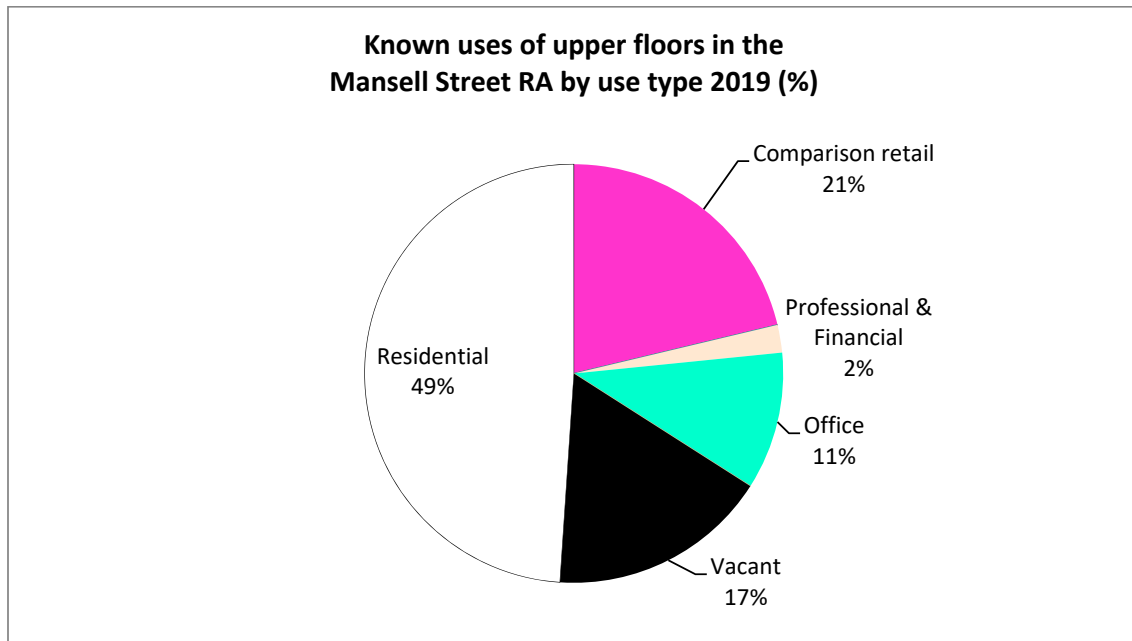


Figure 10: Percentage of upper floor units in different uses within the Mansell Street/Le Bordage Regeneration Area, where known, 2019

There is a high percentage of residential use on the upper floors within the Mansell Street/Le Bordage Regeneration Area. Since 2018, there has been an increase in the number of vacancies recorded. As with other areas, there may not be an actual increase in vacancies but improved recording of those vacancies, and the low number of units in this area in particular means that a small change results in a higher percentage shift than it would, for example, in the Core Retail Area.

#### Footfall counts and Opening Hours

Footfall was consistently higher at lunchtimes than in the morning and afternoons in this Regeneration Area, most likely relating to workers walking to and from Town during this period as many people were in business dress. There were also tourists browsing, and it was notable that people tend to amble up and down Mill Street and Mansell Street (possibly because of the topography as well as the quality of the public realm), in contrast to the Lower Pollet Regeneration Area where people tend to rush through. The pedestrianised nature of the streets also enables a slower pace.

Of the units where opening hours are known, there were no units with extended opening hours and the evening footfall counts in this location were, perhaps predictably given the balance of uses and lack of places open in the evenings, the lowest of the Town evening counts.

#### Building condition

Building condition within the Regeneration Area was generally good, and the percentage of buildings rated as poor had reduced slightly since 2018. However there was a decrease in the number of buildings rated as good, and an increase in those rated as fair. The percentages are shown in Figure 11. As noted, the Regeneration Area excludes the northern

side of Mansell Street where there are additional vacant units in poor condition, and these are not captured in the statistics shown in [Figure 11](#).

Four of the six units rated as poor were occupied, the remaining two vacant.

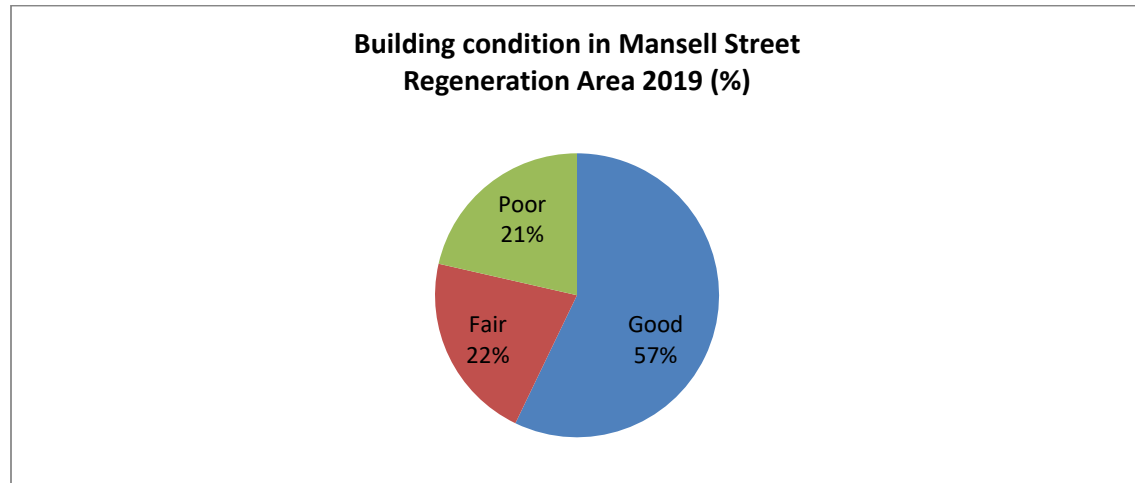


Figure 11: Building condition in Mansell Street/Le Bordage Regeneration Area 2019

#### Façade Activation

Figure 12 shows the façade activation ratings for the Regeneration Area which remain broadly similar to the 2018 findings.

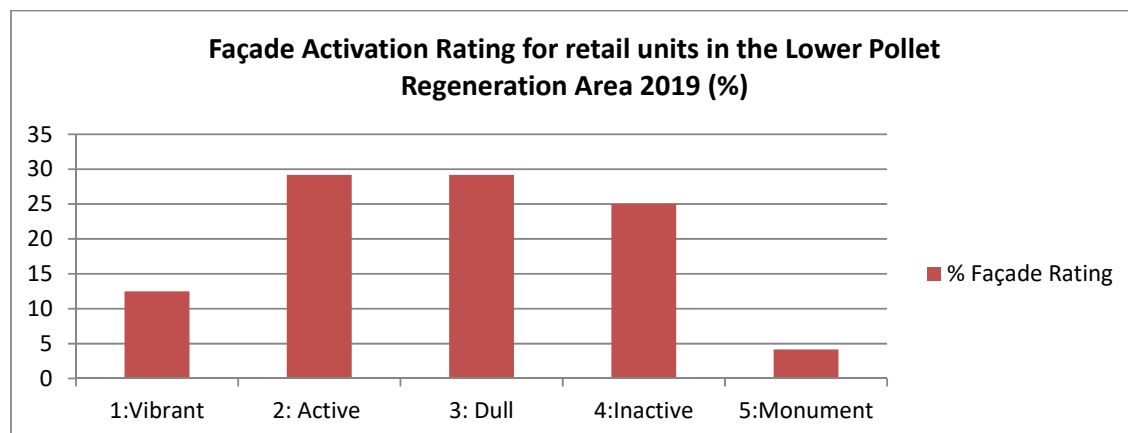


Figure 12: Façade Activation ratings within the Mansell Street/Le Bordage Regeneration Area 2019

The building facades were rated reasonably highly on Mansell Street, with small units, high transparency and a high level of detail. However on Le Bordage the units were not rated as highly for their interest. Here there is reduced dwell time, where people walk by quickly rather than stopping to 'window shop' (exacerbated by the heavy traffic along the Bordage which makes it less attractive to pedestrians). The Monument category included Trinity Church.

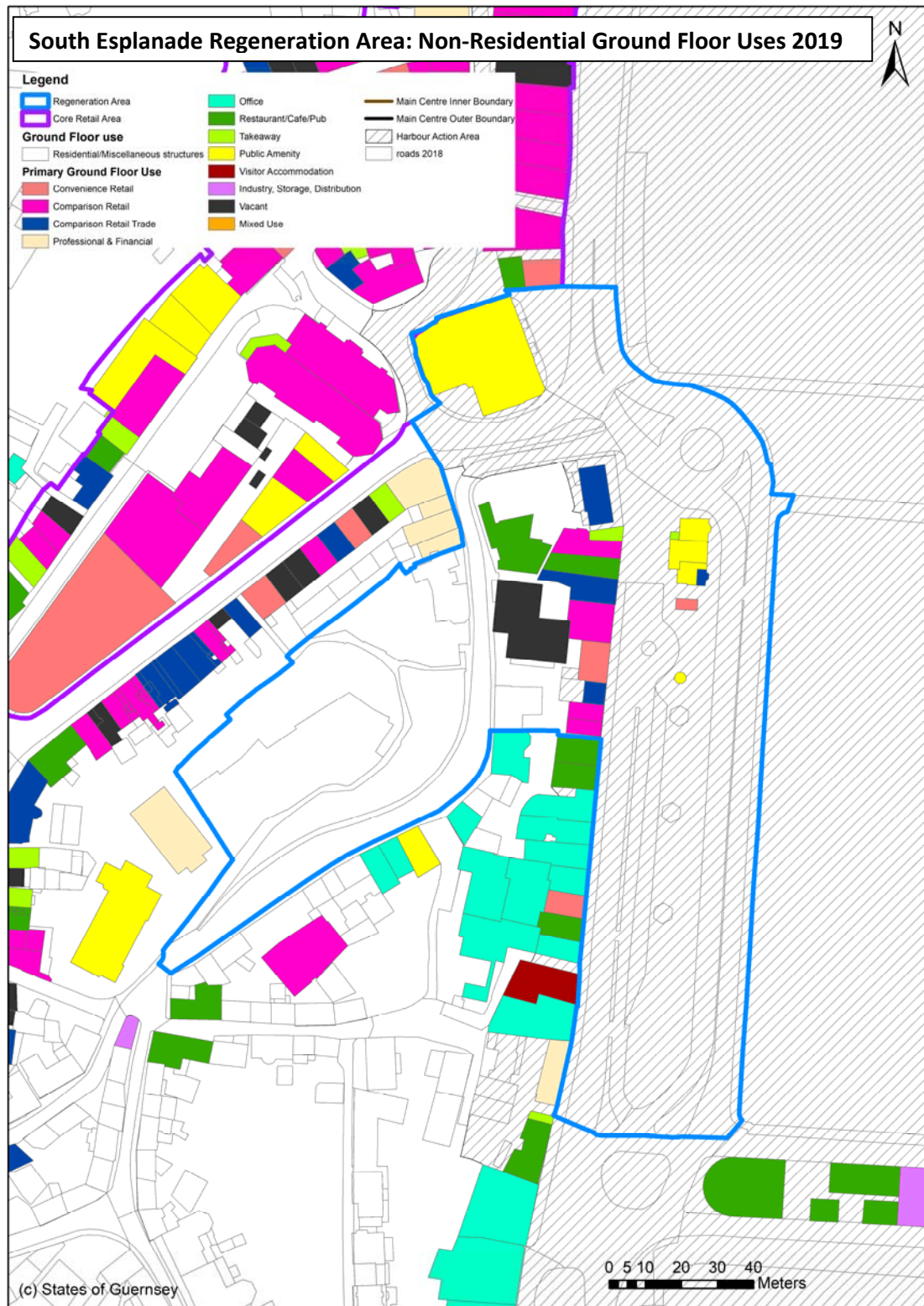
### Public Realm

Improvements to the public realm in Market Street completed in 2020 were in part intended to attract shoppers into the Old Quarter. There is still limited data in this regard, but several of the footfall counts undertaken within the Regeneration Area were higher in 2019 than for the previous two years. Feedback on the scheme has been positive, with more al fresco seating enabled and a more cohesive and attractive environment that emphasises the links to the Old Quarter towards the Regeneration Area. No other changes to the public realm within or impacting this Regeneration Area were noted, however there is potential to establish a valuable public space at Trinity Square which currently functions mainly as a traffic island, despite the attractive planting and seating.

Some of the vacant units in Mansell Street are in a poor state of repair, but the pedestrianised street, cobbled streets and small, interesting shops provide an attractive environment with much potential. However the public realm of Le Bordage is compromised by the heavy traffic and visually less appealing shop fronts, discouraging window shopping and extended dwell time.

### **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, and the road and pavement fronting the Albert Pier. [Map 9](#) shows the extent of the Regeneration Area outlined in blue, with the Core Retail Area to the north.



Map 9: South Esplanade/Mignot Plateau Regeneration Area Non-Residential Ground Floor Uses 2019



Map 9 shows the uses within the South Esplanade/Mignot Plateau Regeneration Area are diverse but are likely to complement the retail offer of the Town Core Retail Area. Because of the low number of units within this area, a small change can represent a significant shift in the percentages.

#### Ground floor uses

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

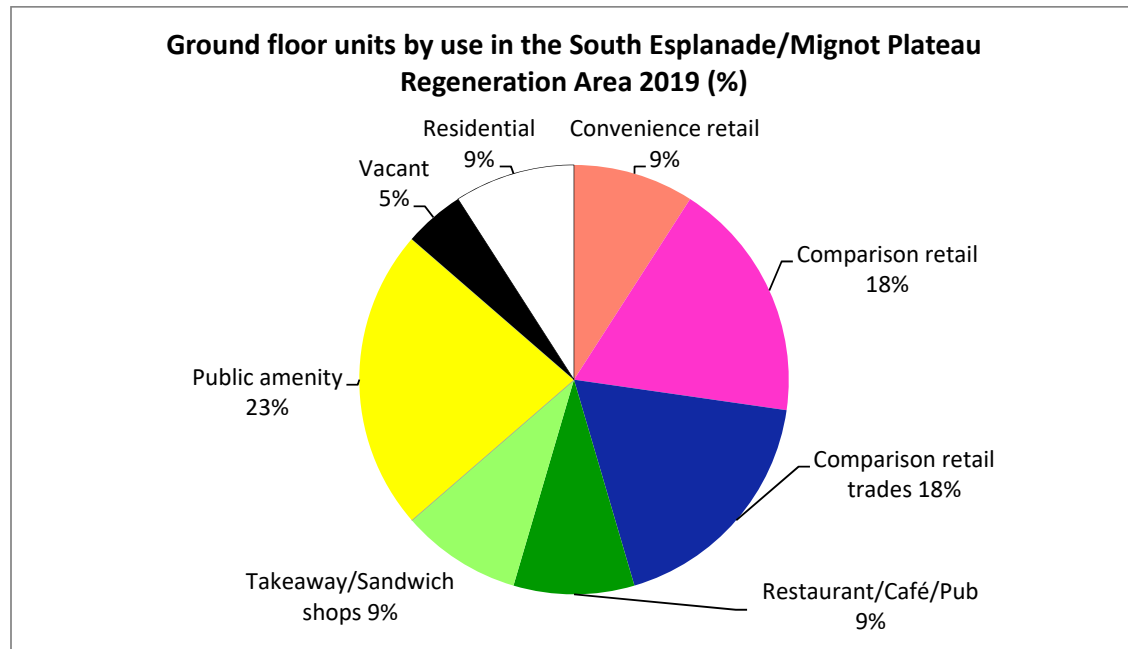


Figure 13: Ground floor units by use in the South Esplanade/Mignot Plateau Regeneration Area 2019

The former Income Tax building was vacant at the time of survey – this was the only vacant unit recorded in the survey. Public Amenity uses continue to form a significant proportion, including Town Church, the public toilets and the outreach kiosk. The only change since the 2018 survey is the use of the former bus information kiosk by various outreach organisations.

#### Upper floor uses

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

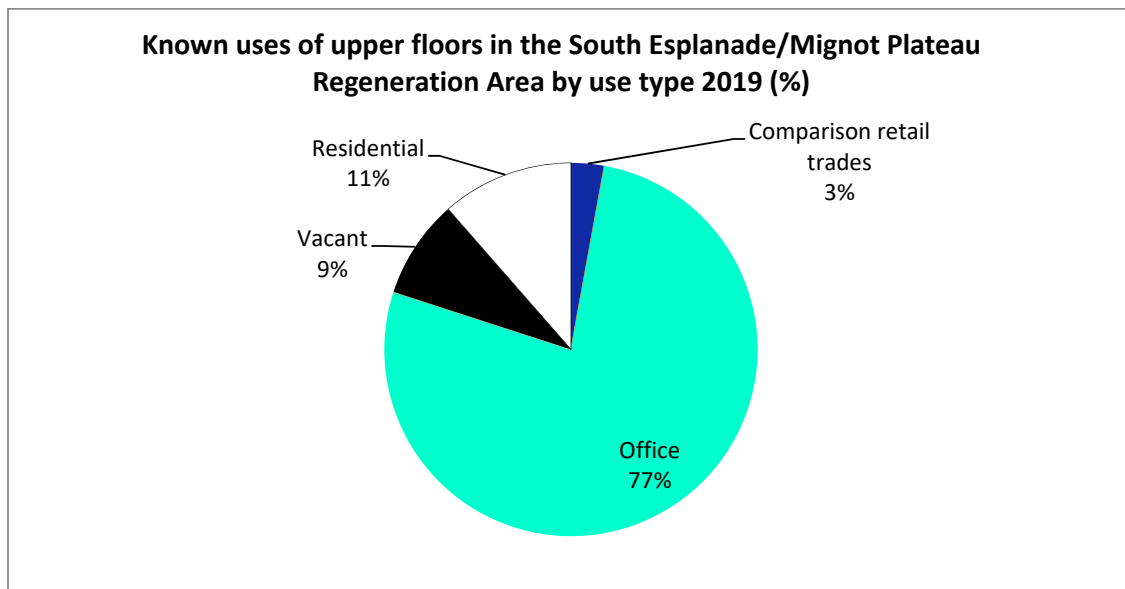


Figure 14: Percentage of upper floor units in different uses within the South Esplanade/Mignot Plateau Regeneration Area, where known, 2019

There are no changes between the 2018 and 2019 data for the upper floors in this Regeneration Area. There is a strong office presence as well as a number of residential units, reflecting the transitional role of this Regeneration Area between the Core Retail Area and the stretch of offices to the south of the Regeneration Area.

#### Opening Hours

There are several units open on Sunday within the Regeneration Area, including Town Church, Tuck Shop and Bus Information shop. The Terrace restaurant and bar is open in the evenings, although opening is seasonal. Units with extended opening hours located south of the Regeneration Area (e.g. White D'Or, The Yacht Hotel) create some footfall through the area in the evenings.

#### Footfall counts

As with the previous two years, the highest footfall counts occurred at lunchtime. The evening count was reasonably high, possibly reflecting the transport role with people accessing the bus terminus and parking, as well as recognising that there are several bars and restaurants to the south of the Regeneration Area with extended opening hours.

Where the counts were undertaken on weekday cruise liner days, there were a lot of tourists in the area as well as a significant number of people in business dress. Local families with children during the school holidays were also among the counts. As the area encompasses the bus terminus, there is often a diverse mix of people waiting for transport, and groups of young people socialising.

#### Building condition

There was very little change between the 2018 and 2019 data on building condition, and the majority of units remain in 'good' condition (see Figure 15 below).

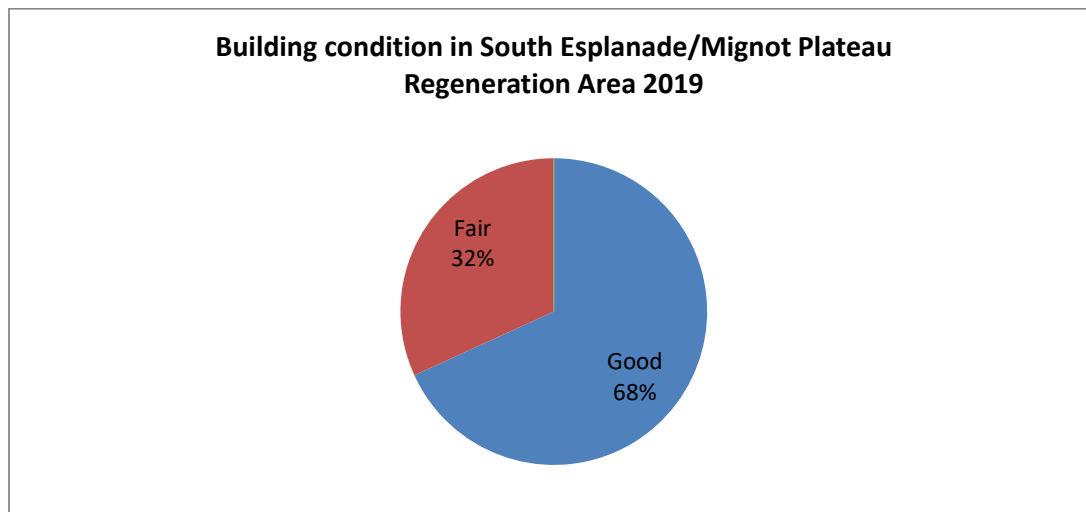


Figure 15: Building condition in South Esplanade/Mignot Plateau Regeneration Area 2019

#### Façade Activation

The Façade Activation assessment found none of the very high quality units that make up much of the Core Retail Area (1: Vibrant), however individually, there were several that were rated as active, being transparent and relatively small (such as The Rose Bowl and Albany Kiosk). The dominance of the Albany building detracts from the historic setting of the area, but there are several interesting buildings categorised as 'Monument' which included Town Church, Woodies, Island Rib Voyages and also Picket House (Trafalgar Travel).

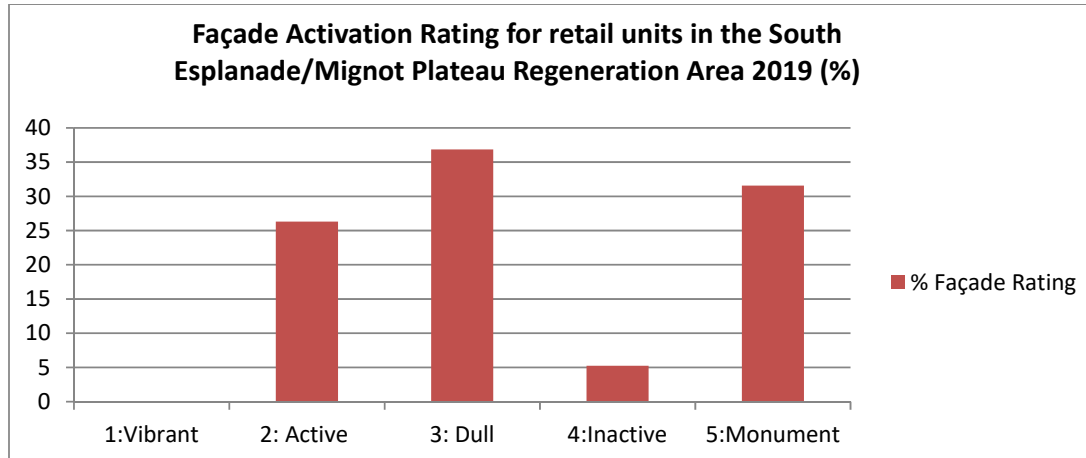


Figure 16: Façade Activation ratings within the South Esplanade/Mignot Plateau Regeneration Area 2019

#### Public Realm

There are several distinct areas within the Regeneration Area, including the bus terminus, the harbour side, the shops and services of South Esplanade, the area around the public toilets/Picket House, and Mignot Plateau.

The bus terminus is isolated from the shops and facilities of South Esplanade and from the harbour by roads all around it. It is particularly difficult to access the bus terminus from the

southern end where there are no dedicated crossing points and where multiple lanes of traffic, parked cars and walled planting areas all form barriers to pedestrians.

Resurfacing works were undertaken in 2019 which included works around the Bus Terminus, which as a result was temporarily located to North Beach Car Park throughout November.

Alongside the harbour there is a well-used footway marked by a post and chain fence, which links the Albert Pier with the Castle Emplacement. Given the importance of this route in linking Castle Cornet to Town, opportunities to improve the pedestrian environment here could be beneficial.

In front of Woodies coffee shop, outside Picket House (Trafalgar Travel) there is a small area with seating and bicycle parking which is well used by passers-by, however the environment could be improved. At the time of the survey there was more litter in this area than in others areas surveyed, particularly cigarette ends. This detracts from the appearance of the area.

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 which are currently best appreciated from the edge of a busy car park, creating conflicts between users. More could potentially be made of the pedestrian connections and linkages to the plateau, and of the greenspace within this area, accepting that the topography is challenging.

### **Goad Categorisation of Uses in the 'Town Centre' Area**

Goad categories group similar retail uses whilst also providing a greater level of detail to build a more in depth picture of what makes up a Town Centre. In order for the data to be comparable with town centres in other jurisdictions, the categorisation is applied to the main retail areas of Town which extends beyond the Core Retail Area. Based on the Goad maps included in the Roger Tym Report (2010<sup>10</sup>) and refined to reflect the current situation, Goad data has been collected which encompassing the Core Retail Area, parts of the Regeneration Areas and some of the Main Centre Inner Area.

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

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<sup>10</sup> The Roger Tym & Partners Retail Study (2010) was one of a number of sources of evidence that informed the 2013 'Retail Strategy for Guernsey' and subsequently the development of retail policy within the IDP 2016.

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

Use	Goad Category	Percentage
Bakers	G1A	0.00
Butchers	G1B	0.27
Greengrocers & Fishmongers	G1C	0.00
Grocery, Frozen Food & Supermarkets	G1D	2.97
Off Licence and Home Brew	G1E	0.81
Newsagents, Confectioners & Tobacconists	G1F	2.43
Footwear, Cobblers	G2A	0.81
Men's & Boys wear	G2B	1.35
Women's, Girls and Children's Wear	G2C	5.14
Mixed and General Clothing	G2D	5.41
Furniture, Carpets & Textiles	G2E	3.51
Booksellers, arts/crafts, Stationers, Copy Bureaux	G2F	2.97
Electrical, Home Entertainment	G2G	2.16
DIY, Hardware, Household Goods	G2H	0.81
Gifts, China, Glass and Leather Goods	G2I	4.05
Motor Accessories, Car, Motorbike or Boat Sales	G2J	0.27
Pharmacy, Toiletries, Opticians	G2K	3.51
Department, Variety and Catalogue Stores	G2L	2.43
Florists	G2M	1.08
Sports, Toys, Cycles & Hobbies	G2N	2.70
Jewellers, Clocks & Repair	G2O	5.14
Charity Shops, Pets and Other	G2P	1.62
Hot food Takeaway, Sandwich Shops, Cafes, Restaurants	G3A	19.46
Hairdressers, Barbers, Beauty Salons	G3B	7.03
Dry Cleaners, Laundrette	G3C	0.54
Travel Agents	G3D	0.81
Banks, Accountancy, Financial Services	G3E	2.97
Building Societies	G3F	0.00
Auctioneers, Estate Agents	G3G	2.43
Post Office, Employment, Careers and information	G4A	2.43
Vacant	G4B	14.86
<b>Total</b>		<b>100.00</b>

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

As with 2018, within the Goad area as a whole, the Hot Food Takeaway, Sandwich Shops, Cafes & Restaurants category has the highest representation, with approximately 19.46%. Vacancies represent the next largest percentage, with approximately 14.86%. This figure is higher than that for the Town Core Retail Area, as for the purposes of the Goad categorisation the area to which Goad has been applied includes areas with multiple vacant



units, such as Mill Street, Fountain Street, Le Bordage and Lower Pollet. The national town centre vacancy rate was 10.3% in July 2019 according to the British Retail Consortium<sup>11</sup>. For comparison, at the time of the last comprehensive Goad survey of Town as part of the Roger Tym & Partners Guernsey Retail Study, 2010, 14.6% of units were recorded as vacant, compared to the UK average of 11.4%. In short, the 2019 vacancy rate in the St Peter Port town centre area has risen slightly above that present in 2010, at 14.86% in 2019 compared to 14.6% in 2010. Compared to 2018, there has been an increase in vacancies of approximately 2%.

### **Town: Overall Summary and Conclusions**

Town remains the Island's primary retail centre and the Core Retail Area appears to be functioning well with high levels of daytime footfall, increasing visitor numbers and evidence of continued investment through renovation and refurbishment.

As discussed in the introduction to this report, the IDP places emphasis on maintaining and enhancing the viability and vitality of the Main Centres and several factors which underpin this concept. These are:

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

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

#### Diversity of uses

The IDP seeks to support the Main Centres as mixed-use areas with a diverse range of activities taking place within them. Recognition is given to the changing role of the high street towards a mix of leisure activities, employment and support service industries, and support is given to the inclusion of uses such as cinemas, theatres and entertainment spaces.

It is the intention of the Strategic Land Use Plan and the IDP that Town remains the island's primary retail centre, which continues to be the case.

The Main Centre Outer Area is predominantly residential, with diversity of uses increasing in density in the Main Centre Inner Area towards the Core Retail Area, where commercial uses dominate. This is appropriate and consistent with the spatial strategy as described in the IDP.

There is reasonable diversity within the retail offering of the 'town centre' area, although the GOAD analysis highlights some areas of weakness (such as convenience retail and DIY/hardware stores). As described in previous sections, there are appropriate uses

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<sup>11</sup> <https://brc.org.uk/news/2019/2019-aug-12-footfall-monitor-july>

complementary to the retail units, such as cafés, restaurants, banks, hairdressers etc. within the Core Retail Area and also within the Regeneration Areas. The IDP notes that there may be opportunities for large floor plate retail to come forward within the Regeneration Areas and the Harbour Action Area, should this be considered appropriate, where it does not adversely affect the vitality and viability of the Core Retail Areas. Such units might support an increase in diversity within retail.

The diversity within the evening economy could be improved in the Main Centre, primarily through the addition of a cinema. Extended opening is mainly limited to restaurants, cafes, bars and pubs, with some hairdressers and beauticians offering late opening too. Alternatives to the clubs and pubs are St James and less frequently Beau Sejour (through theatre and film events), as well as members clubs such as the yacht club. Late Night Library and occasional evening events (e.g. Night at the Museum at Candie, and seasonal late night shopping) add to the offering.

There is a variety of employment-related uses within the Main Centre, including offices, industry, storage and distribution. The relative requirements for these employment uses is assessed in the Employment Land Supply reports.

There are two States of Guernsey primary schools in the Town Main Centre, Amherst on the northern side of town and Vauvert to the south. There is no States secondary school provision within the Main Centre, but both Elizabeth College and Ladies College have their main campuses in Town. Several nurseries and pre-schools operate from the Main Centre Inner Area. The Princess Elizabeth Hospital falls Outside of the Centres, but there are doctor's surgeries and dentists in the Main Centre Inner Area.

Opportunities for leisure and recreation include Castle Cornet, Havelet Bay, La Vallette, Candie Gardens, Guernsey Museum, Beau Sejour, St James, Cambridge Park, Guernsey Sailing Trust and the Military Museum. Social Clubs include the Yacht Club. Limitations of the leisure and recreation offering are access to public open space in some parts of the Main Centre and Main Centre Outer Area, with the main provision on the north side of the St Peter Port, and just one main children's play area (at Beau Sejour).

Overall, Town has a reasonably diverse offering but there are limitations and opportunities within certain sectors, such as the evening economy, leisure and recreation, and some retail sectors within the main retail areas

#### Accessibility and footfall

To be successful Centres, people need to be able to get to the Main Centres and travel around them easily. This is also supported by a high density resident population. Accessibility is also affected by congestion, topography, availability of parking, pedestrian and cycle infrastructure, public transport amongst other factors. Accessibility in and around St Peter Port is not without challenges but improvements are being made year on year, for example resurfacing works, pedestrian infrastructure, trial road closures, changes to bus times and the introduction of new speed limits etc.

As noted there are good public transport links and connections to St Peter Port, although there is no central transport hub. There are large areas of surface car parking on the Piers which limits access for pedestrians, and conflicts exist between traffic and pedestrian movements along the seafront. Bus passenger numbers continue to rise and all routes begin and end at the Town Terminus.

The indicative footfall counts continue to highlight the positive impact of office workers during the week, given the higher numbers recorded at lunchtimes and observations of the number of people in business dress. The impact of cruise visitors on footfall numbers is also clear and makes a positive contribution to the vitality of Town and the overall feeling of busy-ness, though clearly this is a seasonal impact.

Improvements could still be made to the pedestrian infrastructure and there are opportunities such as the vennelles in Town. Extended opening hours and greater diversity in the evening economy could increase footfall throughout the day and evening. The dominance of traffic along the harbour, through the Lower Pollet, South Esplanade and Le Bordage continues to have impacts on other users and on the overall 'experience' of visiting town, for example through the physical separation of the harbour by the busy road, and by the noise and fumes inherent with heavy traffic. There may be opportunities to balance access by private cars with the needs of other users through the Harbour Action Area and Regeneration Areas.

#### Occupied versus vacant space

Vacant units, particularly those in a state of disrepair, can have a significant impact on the overall appearance and 'feel' of an area. A high percentage of vacant units can give a run-down impression and detract from the remaining offer, potentially discouraging investment.

Outside the Core Retail Area and Regeneration Areas there are relatively few vacant units within the Main Centre Inner and Main Centre Outer Areas. These include vacant retail units on Fountain Street and Mill Street and former States buildings such as the former Education Offices on Grange Road and Les Vardes House on La Charroterie. The retail vacancies in the Main Centre Inner Area detract from the attractiveness of the environment, but the scattered nature of the vacancies in the Main Centre Outer Area have less of an impact and are few in number.

The number of units recorded as vacant in the 2017, 2018 and 2019 surveys are shown in **Figure 17** by area. There is no data for the Goad area for 2017 as this only covered a smaller area and is not comparable.

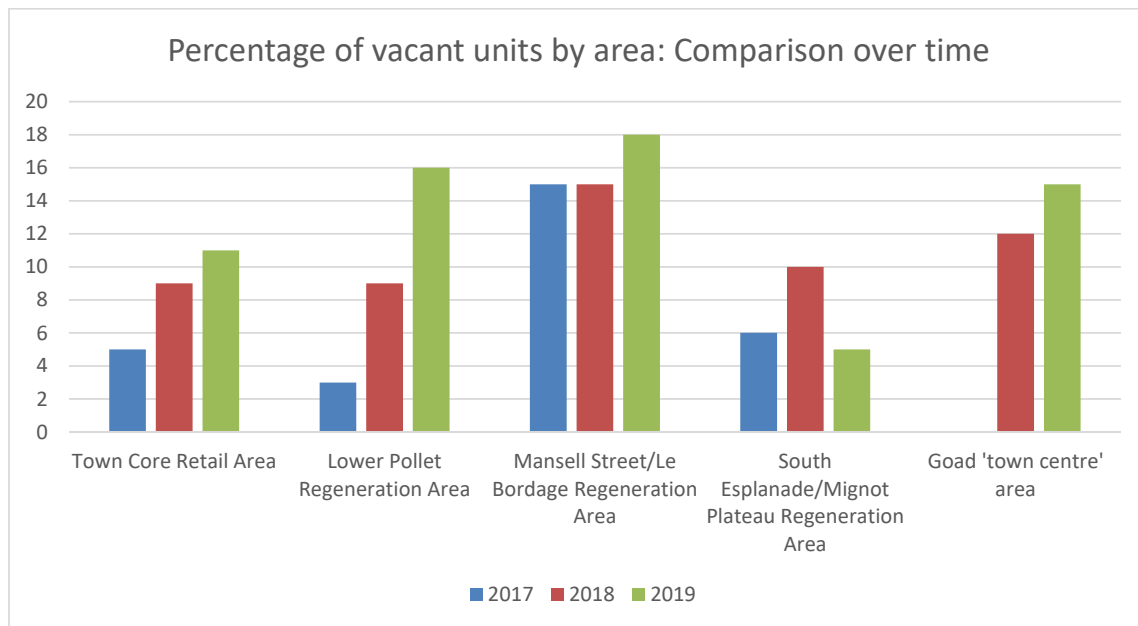


Figure 17: Percentage of vacant units by designation in 2017, 2018 and 2019

As can be seen, with the exception of the South Esplanade/Mignot Plateau Regeneration Area, the percentage of vacant units in each area has risen each year. At the moment specific details of the characteristics of vacant unit such as floorspace, tenancy, cost or amount of time spent vacant are not collated. However it is noted that some are re-let quickly and others spend significant time on the market. It is also worth noting that several vacant units in the Lower Pollet Regeneration Area are undergoing renovation (The White Hart and Lower Pollet Food Hall) which is an encouraging sign of investment.

The impact on vitality and viability of increasing vacancies appears to vary according to area, for example the Mansell Street/Le Bordage looks run down in places, whilst the Core Retail Area generally retains its attractive environment and feeling of vibrancy despite increased vacancies. Therefore different approaches to vacancies might be appropriate within different areas. Strategies to address vacant units outside of the planning framework might also be appropriate, depending on the reasons behind the vacancies.

#### Quality of buildings and space

St Peter Port Main Centre is described in the IDP as having a high quality urban environment, created by layers of historic and modern buildings and a network of attractive streets and open spaces. The Conservation Area Appraisal of St Peter Port will analyse the detail of the urban environment and provide more information on this topic.

Attractive places and spaces are likely to be more successful (i.e. vital and viable) than unattractive places and spaces, and fundamentally St Peter Port is perceived as an attractive town, the 'jewel in the crown' of Guernsey. This is a strength that the IDP intends to build on and with which the Conservation Area Appraisal will assist.

In terms of the findings from this survey, the building condition surveys indicate a high level of care for the built environment, with few units in poor condition. The façade activation

surveys similarly highlighted the high quality of the built environment, but also where there are facades that were rated as 'dull' or 'inactive' and this suggests parts of Town where investment might be beneficial (for example in the Regeneration Areas there are opportunities to improve).

Evidence of investment can be seen through bunting, floral displays and street entertainment which provide an attractive and vibrant environment.

Traffic and transport is a major issue for St Peter Port, impacting on the quality of spaces and the attractiveness of the environment overall so there are opportunities for improvement in that regard, which will most likely come via the Harbour Action Area Local Planning Brief and the Regeneration Area Development Frameworks, which could contribute to improving the piers and seafront – spaces which currently have a lot of potential but are limited by traffic and car parking issues.

There may be opportunities to address traffic congestion and conflict in other areas of the Main Centre and Main Centre Outer Area where it relates to development sites.

Candie Gardens and Cambridge Park both offer high quality publicly accessible open space. Both areas are also designated as Important Open Land, Candie Gardens because of its importance as a recreational resource and a 'green lung' in Town, as well as being an important landscape feature and a longstanding part of the structure of the settlement. Cambridge Park has been recognised as an important recreational resource which also creates an attractive setting to this part of Town. Other quality open spaces include the pedestrianised High Street and Market Square, and La Vallette.

Generally speaking, littering and graffiti does not appear to be a persistent problem in St Peter Port, with the possible exception of a proliferation of cigarette ends.

Overall the quality of the built environment is high, but the public realm is dominated by traffic in parts and there is a lack of access to publicly accessible open space.

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

If a Centre is unpopular then it is unlikely to thrive, and measures of vitality and viability will be affected. The IDP sees the Main Centres as socially and economically diverse, with thriving communities.

This indicator is not specifically reflected in the Main Centres survey data, and it may be appropriate to use other data.

For example, the overarching aim of The Future Guernsey Plan is:

*"We will be among the happiest and healthiest places in the world, where everyone has equal opportunity to achieve their potential. We will be a safe and inclusive community, which nurtures its unique heritage and environment and is underpinned by a diverse and successful economy."*

Progress against this aim could provide useful information for the island as a whole.



Additionally, visitor numbers, which continued to rise in 2019, particularly from the cruise sector, indicates continued popularity of the island as a destination, of which, as noted above St Peter Port has been referred to as the 'jewel in the crown'.

At the current time and as part of this survey, there is no data available to suggest that Town is not a popular place for people who live, work and visit, but alternative data sources could expand on this theme.

### Conclusion

Town Main Centre appears to be functioning reasonably well in terms of vitality and viability, and there are clear strengths to build on such as the quality of the built environment. However there are also weaknesses and opportunities to be addressed, such as improving the public realm and managing conflict between road users, enabling enhanced pedestrian access to the piers and seafront, supporting diversification in the evening economy and enhancing access to publicly open space and opportunities for children's play.

Vacant units have continued to rise in the Main Centre and are having an impact on the appearance of some parts of town, though not in all areas. There may be different approaches to addressing vacancies depending on location, condition or other variables.

It is difficult to measure whether Town is becoming more or less vital and viable – evidence of investment is positive, visible improvements to public realm and accessibility have been made but there have also been increases in vacant units. Overall the impression is one of general stability but with significant opportunities to improve.

## The Bridge (St Sampson/Vale)

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

The 2013 Retail Strategy<sup>12</sup> considered that the Bridge area was generally not performing as well as it could as a retail location at that time. The Strategy noted two factors that might positively influence the area – the high population level located close to the Bridge, and the potential redevelopment of Leale's Yard. The Strategy also noted that the main part of the Bridge shopping area appears to be dominated by charity and 'value' shops, with Southside offering little to entice the shopper looking for comparison goods.

Informal public feedback throughout 2019 highlighted continuing concerns relating to potential over-development of the Bridge Main Centre, the loss of green field sites, and concerns over impacts of the one-school two-sites secondary model of education (which has since been paused). The limitations of transport infrastructure to support housing and schools development, in particular the capacity of the road network, have been raised.

In July 2019, the Policy & Resources Committee agreed to make funding available to undertake Development Frameworks for the four Regeneration Areas. The first of these to be progressed is Leale's Yard. Following a tendering process, work has commenced and a Development Framework for Leale's Yard was approved by the Development & Planning Authority in May 2020. There has been extensive public consultation as part of preparing the Development Framework with many people wanting to engage with the process and generally supporting of redevelopment of the site and improvements to the area.<sup>13</sup>

Several other Development Frameworks were approved in 2019 for sites within the Bridge Main Centre and Main Centre Outer Area. These were relating to Pointues Rocques (allocated for housing in the IDP) English & Guernsey Arms (for potential mixed use), Le Maresquet (for housing) and Richmond House (for housing).

### The Bridge Accessibility

As noted, for the Main Centres to thrive, it is important that people can get to them easily and move around them easily. Accessibility is affected by congestion, availability/cost of car parking, public transport, availability of pedestrian and cycle infrastructure, as well as the topography and road surfacing, for example. Congestion and traffic infrastructure has been raised as a particular concern relating to the Bridge Main Centre.

<sup>12</sup> 'A Retail Strategy for Guernsey', December 2013, was approved by the former Commerce and Employment Department and informed the development of retail policy in the IDP 2016.

<sup>13</sup> <https://guernseypress.com/news/2019/07/26/bridge-traffic-needs-sorting--as-does-leales-yard-problem/>

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

In terms of accessing the Bridge Core Retail Area, there is a taxi rank close to the Marine & General buildings plus cycle stands at either end of the main shopping area. Dedicated motorcycle parking is available and disabled parking spaces are also located on The Bridge. Pedestrian and cycle routes have not been mapped but it is known that pedestrian movement is hindered in the central shopping area of The Bridge both by traffic flow and parked cars. Traffic congestion can be an issue around the junction of Nocq Road and New Road. The topography of the Bridge Core Retail Area, which is largely level, makes access easier for pedestrians than the hillside town of St Peter Port. The location of parking outside the Bridge frontage, whilst a contributor to congestion, also attracts people due to the convenience.

The 2019 bus timetable, which came into force on 29<sup>th</sup> April 2019, included amendments to two routes, one of which serves St Sampson/Vale (route 12). However there is no change to the number of routes overall that serve the Bridge Main Centre Inner Area (7 routes, including the N1 night bus), plus route 21 continues to serve Halfway and the Braye Road crossroads in the Bridge Main Centre Outer Area. Also in April 2019, a number of speed limit changes in the Bridge Main Centre and Main Centre Outer Areas came into force.

In December 2019, the Committee *for the* Environment & Infrastructure published a Policy Letter for debate in the States of Deliberation (scheduled for debate 5 February 2020), titled “The On-Island Integrated Transport Strategy – First Periodic Review”. This lists key achievements since 2014 against the strategic objectives of the Integrated Transport Strategy. The Policy letter sets out that following consideration of the review, the Committee has identified new priorities, including improving access within the St Sampson/Vale Main Centre and Main Centre Outer Area. Other priority areas relate to investigating the feasibility and viability of installing a bus and taxi lane southbound between Bulwer Avenue and the Red Lion.

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. In August 2019 a review of harbour operations in both St Peter Port and St Sampson’s was instigated, to consider if new harbour facilities are required, and what the best location would be for them. This review is currently underway.

### **The Bridge Main Centre Inner and Main Centre Outer Areas**

As shown in [Map 10](#), industrial, storage and distribution uses form the majority of the non-residential uses in the Main Centre Outer Area, due to the presence of the Key Industrial Areas. However buildings falling within the areas designated as Key Industrial Areas and Key

Industrial Expansion Areas were not individually surveyed so there is no further analysis of those areas within this report.

Public amenity uses including St Sampson High School, St Mary and St Michael RC Primary School and Guernsey College of Further Education Delancey Campus are located in the Main Centre Outer Area and there are a few other non-residential units along the Traffic Priority Routes of Vale Road/Route Militaire and La Route du Braye.

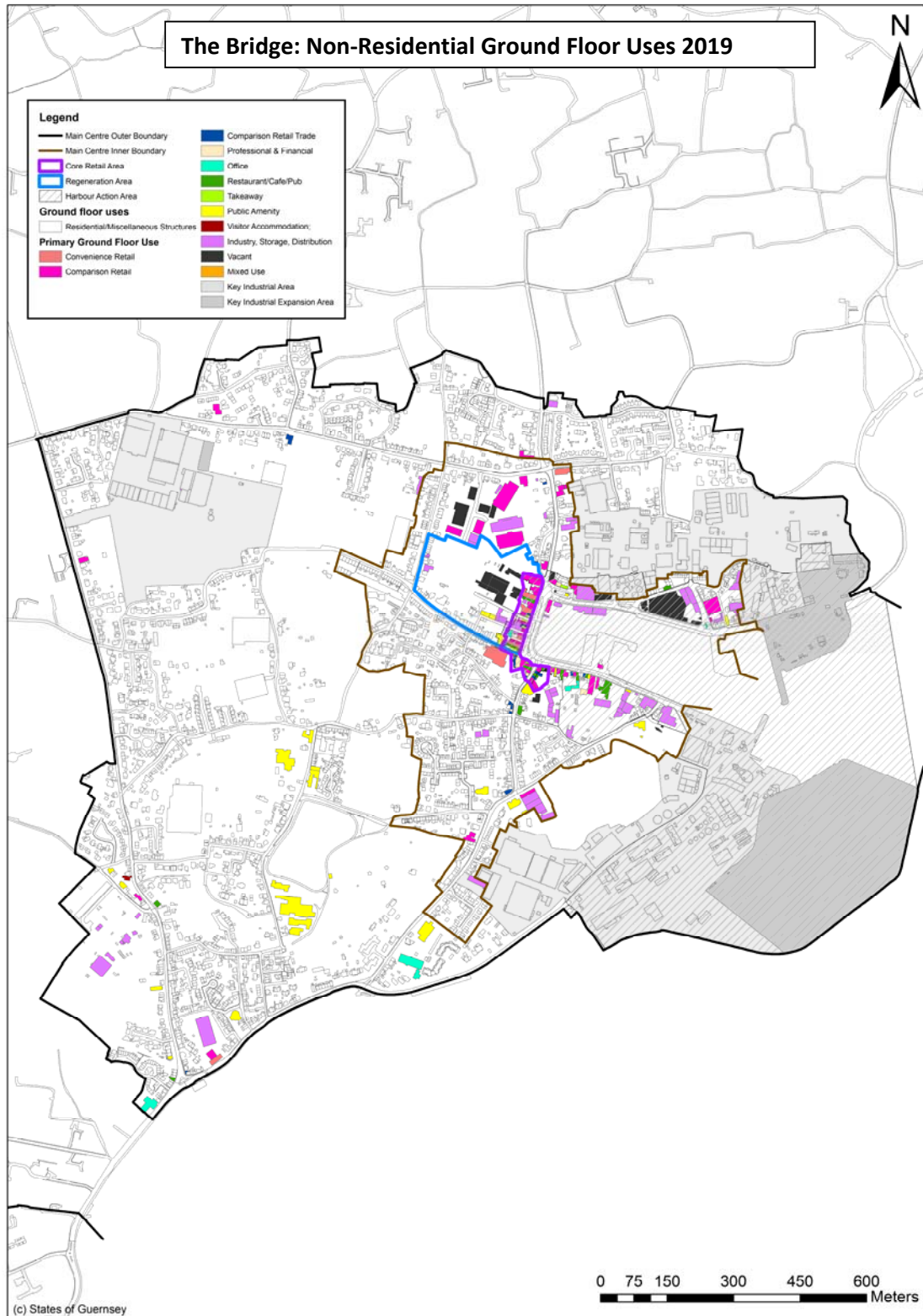
Just outside of the Main Centre Outer Area, expressions of interest were sought in 2019 to 'realise the potential' of La Tonnelle, Les Banques, which is a building formerly used as a tram stop and public toilets (close to the Halfway junction).<sup>14</sup> Whilst outside of the Main Centre, this is noted due to its proximity with the Main centre Outer Area boundary.

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 an absence of office uses in contrast to Town, and there are more industrial, storage and distribution uses around the central part of the Bridge Inner Area. Several large vacant units are located within the Main Centre Inner Area (former Quayside building, former Co-Op Homemaker buildings and Leale's Yard).

Referring back to image 2 of this report, there is a large swathe of Important Open Land designated within the Main Centre Outer Area, running alongside the Main Centre Inner Area boundary. This land is protected from insensitive or inappropriate development because of its importance in enhancing the openness, landscape character and visual quality of the area. However there are other pockets of green land that are not protected by the designation which could enable new development to take place within the Centre and whose potential development has caused some concern amongst residents over the loss of these smaller pockets of green space within the Main Centre.

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<sup>14</sup> <https://www.gov.gg/article/174454/Expressions-of-interest-sought-to-realise-the-potential-of-La-Tonnelle-Les-Banques>

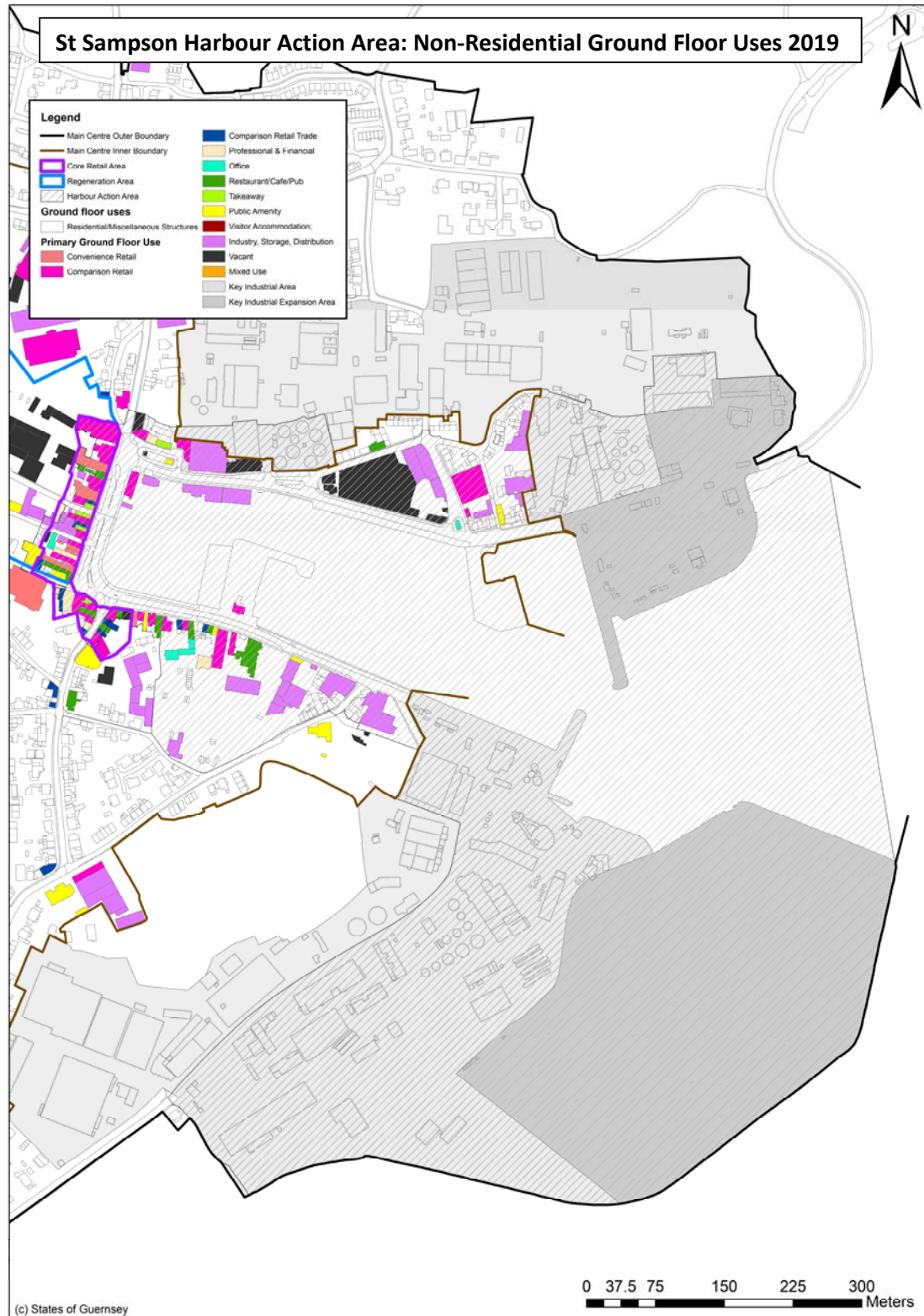


Map 10: Non-residential ground floor uses in The Bridge Main Centre 2019



**St Sampson Harbour Action Area**

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



Map 11: Non-residential ground floor uses in St Sampson Harbour Action Area 2019

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. Planning permission was granted in 2016 for the redevelopment of this site for retail, but this permission expired in October 2019 and no new proposals have been submitted.

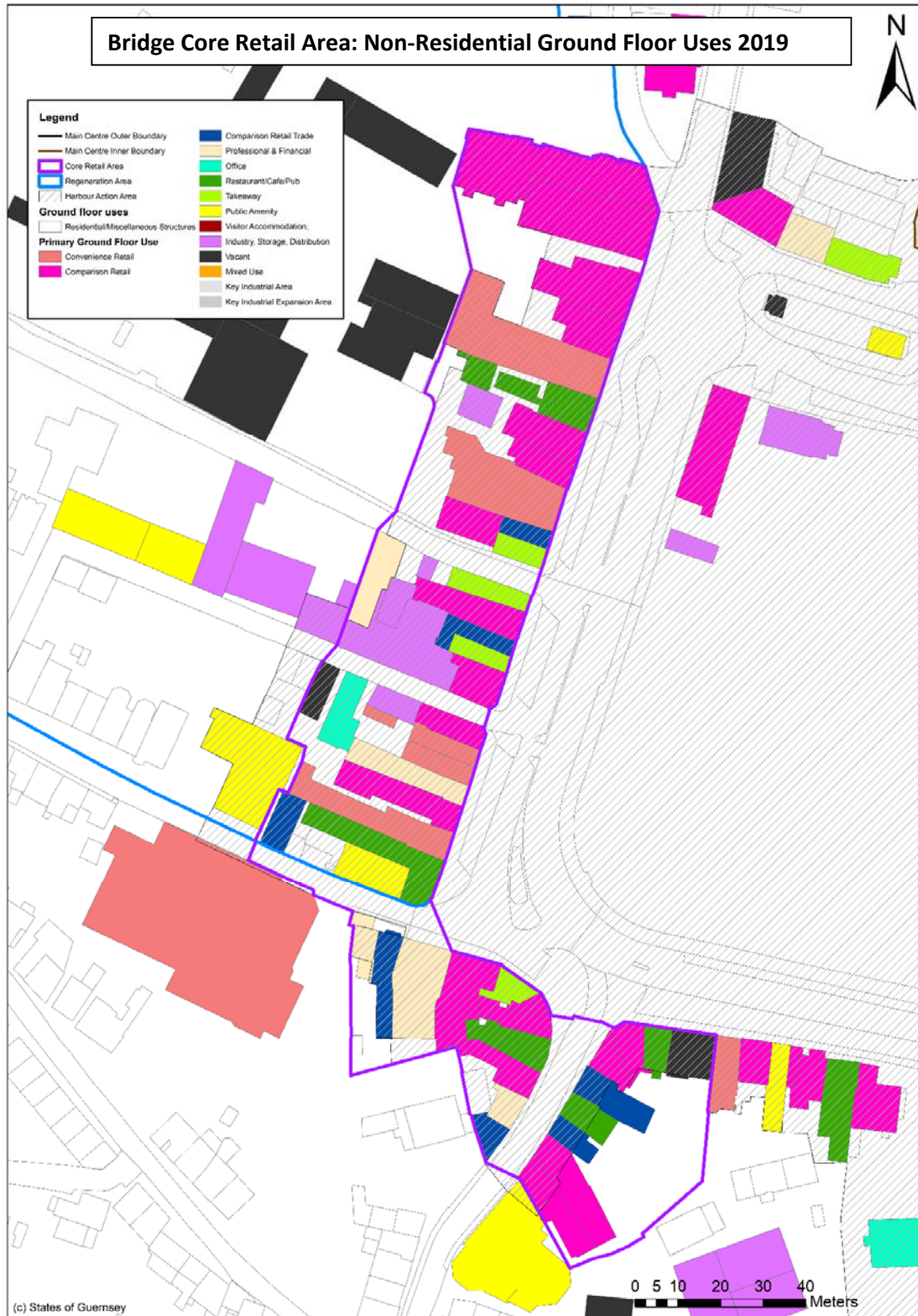
Whilst St Sampson's Harbour area has developed to be predominantly industrial, the leisure marina occupies a large area of the harbour and opportunities for other uses within the Harbour Action Area such as residential, recreation and leisure will be explored through the Harbour Action Area Local Planning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

As noted, a review of harbour operations in both St Peter Port and St Sampson's is currently underway to consider if new harbour facilities are required, and what the best location would be for them.

#### **The Bridge Core Retail Area**

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

Map 12 shows the extent of the designation.



Map 12: Non-residential ground floor uses in the Bridge Core Retail Area 2019

### Ground floor uses

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

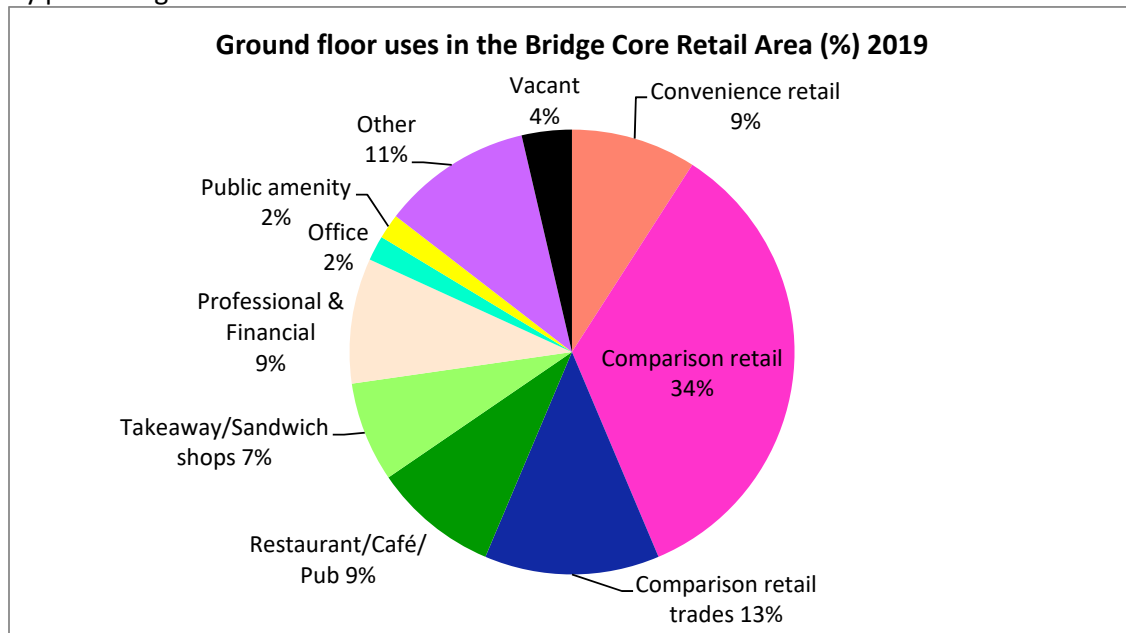


Figure 18: Percentage of ground floor units in each use within the Bridge Core Retail Area 2019

The Bridge Core Retail Area has seen a decrease in the number of vacant units since 2018, falling from 7% to 4% with just two vacant units within the Core Retail Area (former Smilers Menswear and former Old Curiosity Shop). There has also been a rise in the percentage of both convenience retail (the new Co-Op Local having been opened) and in comparison retail trades (for example hairdressers).

Retail is still the dominant use in the Core Retail Area, however the retail function is not as strong as that in the Town Core Retail Area. For example, in the Town Core Retail Area comparison retail, comparison retail trades and convenience retail total 63% of units, whereas in the Bridge Core Retail Area the total is 56% (not including vacant retail units in these percentages). Within the Bridge Core Retail Area there is a higher proportion of comparison retail trades at 13%, compared to just 3% in the Town Core Retail Area.

The 'Other' uses in the Core Retail Area are industrial and/or storage and distribution, representing 11% of ground floor units.

Overall there appears to be a reasonable mix of uses within the Core Retail Area, which is predominantly retail but complemented by appropriate supporting uses, however this balance should be carefully considered to ensure that retail uses continue to dominate in accordance with policy.

### Upper floor uses

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



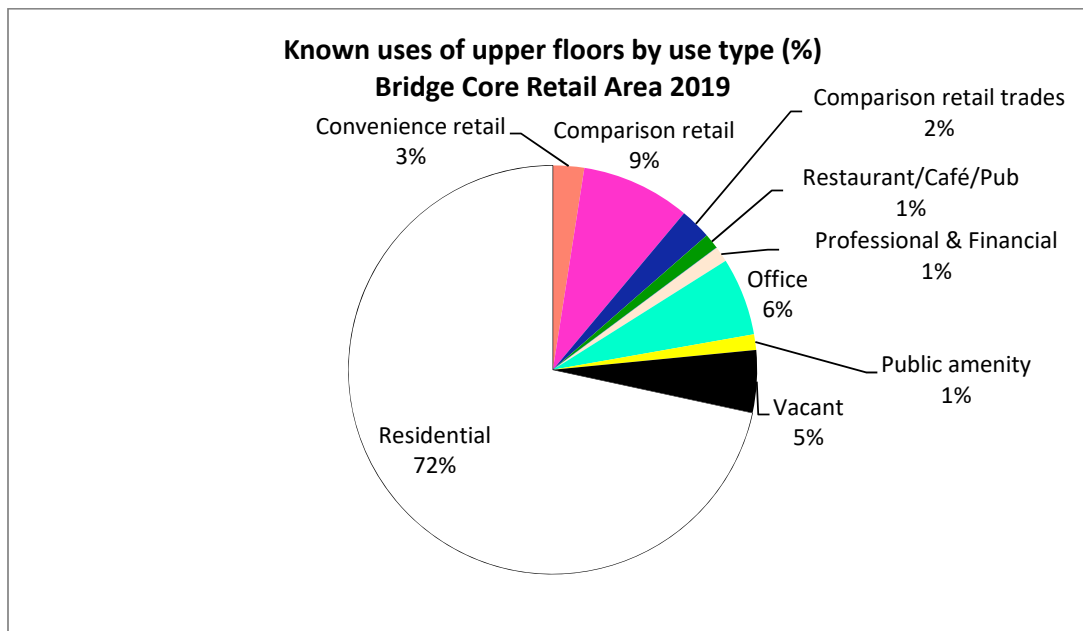


Figure 19: Known uses of upper floors by use type (%) in the Bridge Core Retail Area 2019

The primary upper floor use in the Bridge Core Retail Area is residential. There is a small percentage of offices, as well as retail use ancillary to ground floor retail units.

#### Opening hours

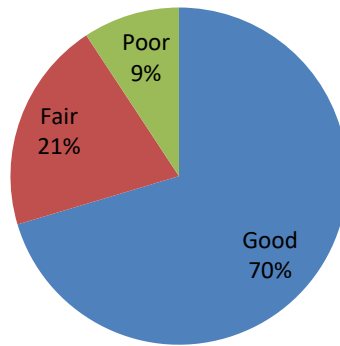
Of the units where opening hours are known, there has been little change since recording began in 2017. Including upper floors as well as ground, 14% of units were open after 5pm and 16% were open on Sundays. Units with Sunday opening included Costa Coffee, Boots the Chemist, Stonelakes Pharmacy, the Candy Shop and Rendevous Café. Those open after 5pm included Cabriz Restaurant, The Mariners Inn, Harbour View Chinese Takeaway and the SPACE Youth Club.

#### Footfall Counts

The footfall counts in the Bridge Core Retail Area were generally higher at lunchtimes, but unlike the data for 2017 & 2018, the Saturday counts were not the highest. The highest counts this year were on Friday lunchtimes and Thursday mornings. The low evening footfall counts are likely to be indicative to be of the lack of evening and night-time economy, particularly in the immediate vicinity of the count locations.

#### Building condition

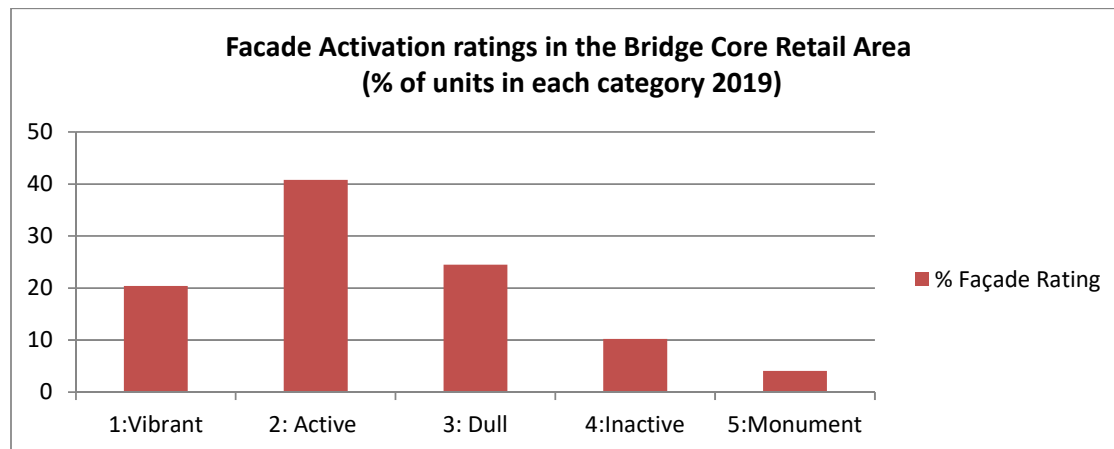
Figure 20 shows the condition of units in the Bridge Core Retail Area.

**Building condition of units in Bridge Core Retail Area 2019****Figure 20: Building condition in the Bridge Core Retail Area 2019**

The majority of units in the Bridge Core Retail Area recorded as being in 'good' condition has increased from 59% in 2018 to 70% in 2019. However there were also more units in 'poor' condition – 9% in 2019 compared to 4% in 2018. Whilst the overall picture remains positive, there is scope for investment in the Bridge to improve the appearance of the Core Retail Area.

#### Facade Activation

Buildings are given a façade activation rating as described in the Methodology section and [Appendix 2](#) of this report and the findings shown in [Figure 21](#) below.

**Figure 21: Façade Activation ratings within the Bridge Core Retail Area (% of units in each category) 2019**

A large proportion of buildings were considered 1: Vibrant or 2: Active (a combined total of 61%) reflecting the quality of the individual units. Ray & Scott and the Mariners Inn were recorded as 5: Monument, as whilst they may be limited in transparency, they both have historic facades that are visually remarkable. Approximately 24% of units (12) were rated as dull – these largely consisted of units that lacked transparency due to small or obscured windows, or those which lacked any interesting detail. These results represent an

improvement to the 2018 records and suggests that some units have been improved since then.

### Public Realm

Despite the good building condition and individually attractive units as recorded in the façade activation study, public realm within the Bridge Core Retail Area detracts from this positive appearance, being dominated by roads and cars. This creates conflicts between users as well as traffic congestion, particularly at the junction of Nocq Road and The Bridge/New Road. Additionally, the active area of the harbour is beyond sight, so the harbour, whilst a positive asset, offers a relatively static view, though an attractive one nonetheless. The main Bridge frontage faces east and consequently is unable to gain from sun in the afternoons/evenings (depending on the season). There is no public focal point, such as a public square for events, and no public art. Some of these limitations will be easier or more desirable to overcome than others.

During 2019 there were several media reports relating to the upkeep and improvement of the Bridge Main Centre, primarily focusing on the main retail area. For example, the Vale and St Sampson Douzaines began a proactive approach to the removal of ‘clutter’, their survey having found a proliferation of poles and posts along the main Bridge shopping frontage area, many of which were not needed<sup>15</sup>. Bridge traders also raised traffic, parking and staffing issues as reasons for difficulties faced by some Bridge traders<sup>16</sup>.

Delivering improvements to the Bridge public realm and harbour frontage, and a comprehensive and integrated flood defence solution, will need to be considered and co-ordinated as part of workstreams such as the Harbour Action Area, which will be key to the Bridge Core Retail Area.

### **Leale’s Yard Regeneration Area**

The Leale’s Yard Regeneration Area includes much of the Bridge Core Retail Area, plus residential properties on Nocq Road and Lowlands Road. Additional non-residential units falling within the Regeneration Area but outside the Core Retail Area are the Salvation Army Community Centre (including café and charity shop), the pumping station/electricity substation 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) are generally in a very poor state of repair.

<sup>15</sup> <https://guernseypress.com/news/2019/02/19/the-bridge-is-like-an-urban-forest/>

<sup>16</sup> <https://guernseypress.com/news/2019/07/24/last-day-of-trading-on-bridge-this-saturday-for-smilers/>;  
<https://guernseypress.com/news/2019/10/05/recruitment-problems-force-bridge-dry-cleaners-to-close/>;  
<https://guernseypress.com/news/2019/07/26/bridge-traffic-needs-sorting--as-does-leales-yard-problem/>

There is a long planning history on Leale's Yard. An Outline Planning Brief (OPB) for the Leale's Yard Mixed Use Redevelopment Area (MURA) was adopted as planning guidance in 2004 and remained in place until the adoption of the Island Development Plan in 2016. Following the adoption of the OPB, three separate planning permissions have been approved for the main development site (that is, the area between The Bridge frontage and Lowlands Road). The three approved planning permissions have varied between a retail-led schemes and residential-led schemes, however none has been implemented and all three of these permissions have now lapsed.

In 2019, The Policy & Resources Committee agreed to make funding available to undertake Development Frameworks for the four Regeneration Areas identified in the IDP. The first of these to be taken forward is the Leale's Yard Regeneration Area Development Framework, which was adopted in May 2020<sup>17</sup>.

As part of the preparation of the Leale's Yard Development Framework, extensive consultation took place which confirmed that the themes set out in the 2013 Vision for the Bridge & St Sampson's Harbour are still considered relevant. These four themes are:

1. Create a thriving Town Centre
2. Make the Bridge a cool place to be
3. Embrace new architecture and reveal heritage
4. Improve movement, parking and the public realm

Comments on the strengths of the area included the easy access and walkable nature of the Regeneration Area (and beyond), the community spirit, the attractive harbour, historic and traditional architecture and the good transport links to Town.

Comments relating to negative aspects and opportunities for improvement included better traffic management to resolve congestion and conflicts between users, need more cafes & restaurants, opportunities for al fresco dining, a more coherent streetscape and environmental improvements, flood defences, more seating which takes in the views of the harbour and provision of green space and community space.

Taking into account the feedback from public consultation, the Development Framework sets out a vision for the Regeneration Area:

“Enhancing The Bridge Main Centre's identity to become a well-connected and easily accessible destination which includes a variety of uses and places to visit and spend time to ensure the ongoing viability and vitality of the area for the local community.”

A significant concern locally has been why development has not previously come forward on this site, despite the previous Outline Planning Brief and three planning permissions in place. As such, a Delivery Strategy is included in the 2020 Leale's Yard Development Framework which sets out some of the reasons that development has so far failed to come forward, and sets out approaches to development in the future which would allow the previous obstacles to be overcome.

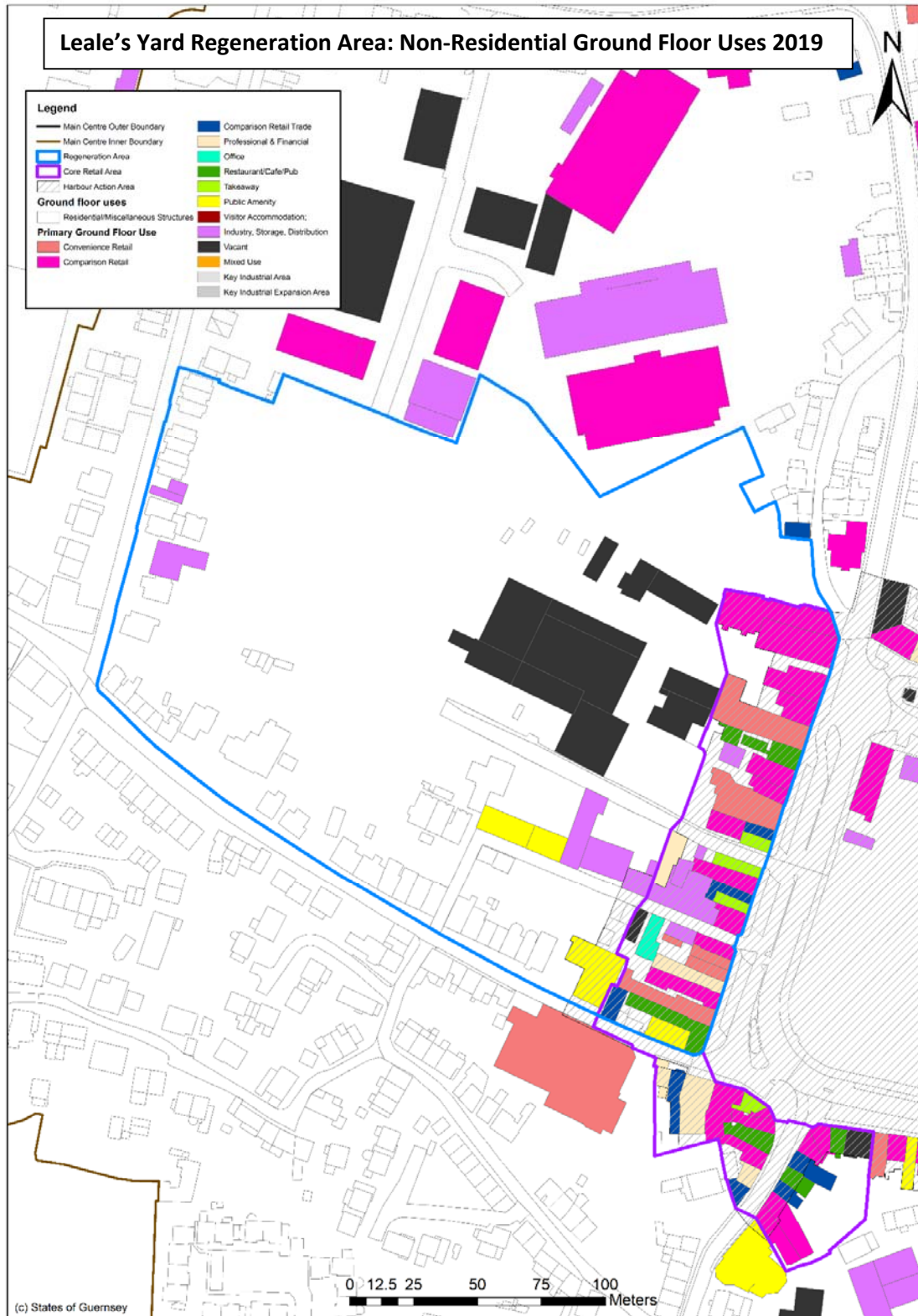
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<sup>17</sup> [Approved Leale's Yard Regeneration Area Development Framework, 2020](#)

The next stage in the process will be to prepare a masterplan for the main development site, to include aspects such as circulation and access, key infrastructure, public spaces and identifying development plots, as well as an overarching Design Code. This will need to be prepared before any subsequent planning applications are submitted.

With regard to delivering improvements to the Bridge public realm and harbour frontage, and a comprehensive and integrated flood defence solution, these will need to be considered and co-ordinated as part of other workstreams being undertaken by the States, such as the Harbour Action Area Strategy.

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



Map 13: Leale's Yard Regeneration Area Ground Floor Uses 2019

In terms of spatial distribution, residential uses (houses, flats, domestic garages) line Lowlands Road and Nocq Road, with vacant warehouses forming the majority of buildings in



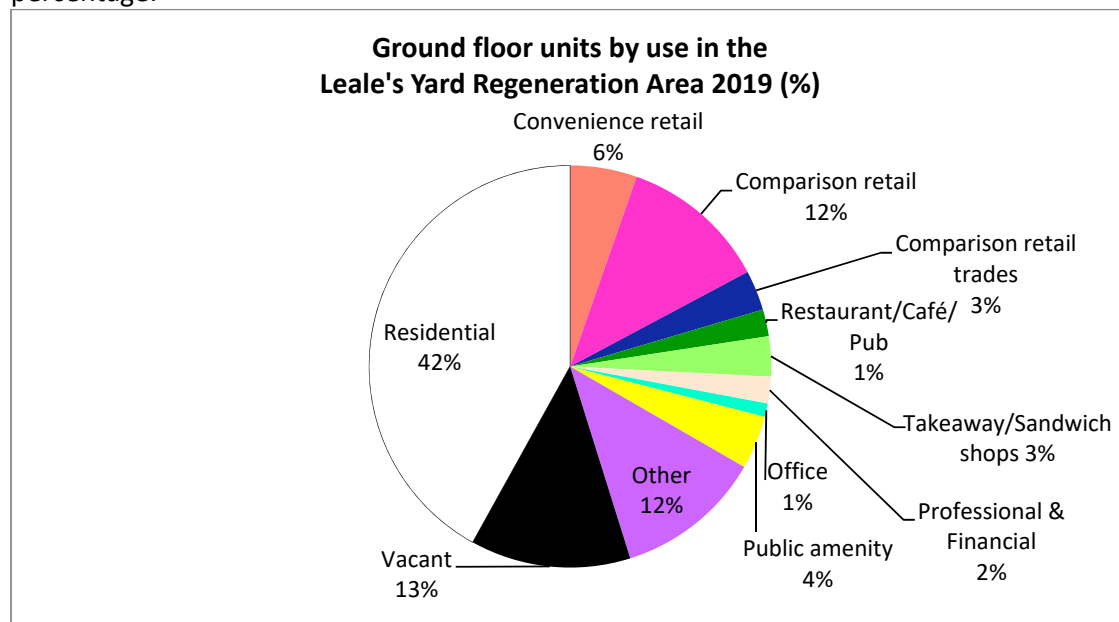
the centre of the designation. Retail and retail trades, takeaways and a pub lie along The Bridge frontage itself (also within the Core Retail Area).

It can be seen from **Map 13** that the main Leale's Yard area, between Lowlands Road and The Bridge frontage, represents a significant opportunity. Its development would make an efficient use of a 'town centre' site and enable issues such as lack of public realm and increasing the attraction of the Bridge Core Retail Area as a destination and experience, not just a centre for convenience, to be addressed.

The Leale's Yard Development Framework requires proposals to incorporate a mix of uses which could include retail, and must also include residential units, a public square/civic space, community centre and open green space on the main development site of the Regeneration Area. Future reports will update on any subsequent progress towards delivery.

#### Ground floor uses

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



**Figure 22: Ground floor units by use in the Leale's Yard Regeneration Area 2019 (%)**

There has been very little change to the balance of uses within the Regeneration Area since surveying began in 2017. The predominant ground floor use remains residential (e.g. the houses on Nocq Road and Lowlands Road). The 'Other' category is predominantly industry and storage. There has been a slight increase in convenience retail compared to 2018, but no significant changes in the balance of uses.

There is one vacancy in the Regeneration Area which also falls within the Core Retail Area (the former 'Old Curiosity Shop'), with the remaining vacancies being the derelict buildings within the area behind the Bridge frontage, consisting of former warehouses/industrial uses.

### Upper floor uses

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

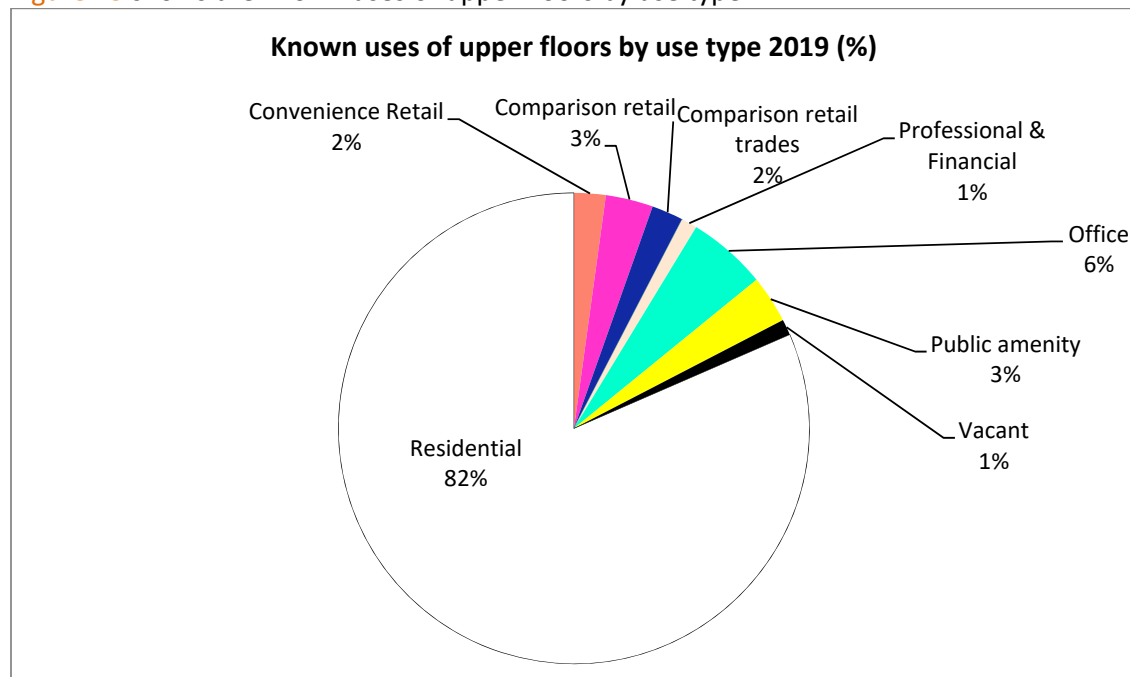


Figure 23: Known uses of upper floors by use in the Leale's Yard Regeneration Area 2019 (%)

There is a large proportion of residential use, which includes the upper floors of houses along Lowlands Road and Nocq Road, as well as residential uses on upper floors of retail units, for example. There have been no significant changes since 2017.

### Opening Hours

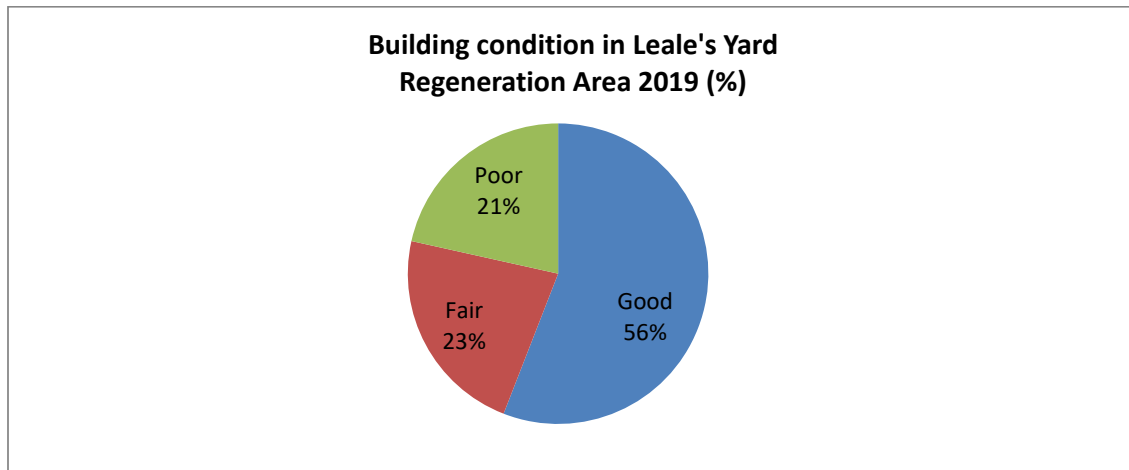
The opening hours of commercial properties in the Leale's Yard Regeneration Area reflect those of the Core Retail Area. The only other additional properties open to the public are the North Social Club and the Salvation Army Community Centre. The Salvation Army Community Centre is generally open Monday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

### Footfall Counts

One of the two footfall count locations within the Bridge lies within the Leale's Yard Regeneration Area (and Bridge Core Retail Area), with the results as described in the Bridge Core Retail Area section.

### Building condition

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



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

The buildings in poor condition are predominantly those behind the main frontage of The Bridge, and constitute various former warehouses and other structures which are derelict or in a poor state of repair. The residential properties are generally in good condition, as were most of the buildings that also fall within the Core Retail Area. This is consistent with the findings in 2017 and 2018.

The building condition survey emphasises the need for investment in the buildings within the Leale's Yard Regeneration Area.

#### Facade Activation

The façade activation ratings were assessed for part of the Bridge Core Retail Area, as previously described. The additional non-residential buildings assessed in the Leale's Yard Regeneration Area were the North Social Club (which was rated 5: Monument) and the Salvation Army Community Centre, which was also rated 5: Monument due to their visually remarkable appearances.

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

The Goad categorisation system has been applied to the main retail area of the Bridge which includes the Core Retail Area and the adjoining retail areas.

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

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

Use	Goad Category	Percentage
Bakers	G1A	0.00
Butchers	G1B	1.43
Greengrocers & Fishmongers	G1C	0.00
Grocery, Frozen Food & Supermarkets	G1D	2.86
Off Licence and Home Brew	G1E	0.00
Newsagents, Confectioners & Tobacconists	G1F	2.86
Footwear, Cobblers	G2A	2.86
Men's & Boys wear	G2B	0.00
Women's , Girls and Children's Wear	G2C	4.29
Mixed and General Clothing	G2D	1.43
Furniture, Carpets & Textiles	G2E	4.29
Booksellers, arts/crafts, Stationers, Copy Bureaux	G2F	4.29
Electrical, Home Entertainment	G2G	2.86
DIY, Hardware, Household Goods	G2H	0.00
Gifts, China, Glass and Leather Goods	G2I	0.00
Motor Accessories, Car, Motorbike or Boat Sales	G2J	1.43
Pharmacy, Toiletries, Opticians	G2K	4.29
Department, Variety and Catalogue Stores	G2L	0.00
Florists	G2M	0.00
Sports, Toys, Cycles & Hobbies	G2N	8.57
Jewellers, Clocks & Repair	G2O	4.29
Charity Shops, Pets and Other	G2P	12.86
Hot food Takeaway, Sandwich Shops, Cafes, Restaurants	G3A	17.14
Hairdressers, Barbers, Beauty Salons	G3B	8.57
Dry Cleaners, Laundrette	G3C	1.43
Travel Agents	G3D	2.86
Banks, Accountancy, Financial Services	G3E	4.29
Building Societies	G3F	0.00
Auctioneers, Estate Agents	G3G	2.86
Post Office, Employment, Careers and information	G4A	0.00
Vacant	G4B	4.29
<b>Total</b>		<b>100.00</b>

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

'Hot Food Takeaway, Sandwich Shops, Cafes and Restaurants' have the highest representation overall (consistent with Town), and 'Charity Shops, Pets and Others' also having significant representation on the Bridge (in contrast to Town). In terms of vacancies, within the Bridge Goad area was 4.29% compared to 14.86% in Town.

There has been an increase in the category representing supermarkets since 2018 with the opening of Co-Op Locale, and a significant decrease in vacancies from 11.11% in 2018 to 4.29% in 2019.

### **The Bridge Main Centre: Overall Summary and Conclusions**

The Bridge continues to offer a complementary shopping experience to Town but with an emphasis on convenience rather than experience or extended dwell time.

As before, there are several factors which underpin vitality and viability. These include:

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

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

#### Diversity of uses

The IDP seeks to support the Main Centres as mixed-use areas with a diverse range of activities taking place within them. Recognition is given to the changing role of the high street towards a mix of leisure activities, employment and support service industries, and support is given to the inclusion of uses such as cinemas, theatres and entertainment spaces.

The Main Centre Outer Area of St Sampson/Vale is predominantly residential with significant industrial, storage and distribution uses (e.g. within the Key Industrial Areas).

In terms of social and community uses there is no secondary education provision within the Main Centre or Main Centre Outer Area, and primary provision is limited to the St Mary & St Michael RC Primary School. However, the former St Sampson's Infant School now operates as a Community/Children's Centre, and the former St Sampson's secondary school is operated as the Delancey Campus of the College of Further Education (now part of the Guernsey Institute). A community library operates from the Salvation Army Community Centre on Nocq Road. There are several social clubs within the St Sampson/Vale Main Centre (SPACE Youth Club, Guernsey Motorcycle and Car Club, North Social Club), plus the GADOC hall.

There is a large swathe of protected Important Open Land that runs north-south in the Main Centre Outer Area, alongside the boundary of the Inner Area. However only Delancey Park, to the south, is publicly accessible, and there are fewer opportunities to enjoy the coastline when compared with St Peter Port Main Centre. There is a Diamond Museum at Ray & Scott Jewellers on the Bridge, but no other galleries or museums in the Centre.

The Main Centre Inner Area is again predominantly residential, but also includes bulky shopping (e.g. Scope Furnishings and Regency Bedding) and industrial, storage and

distribution uses (including marine and motor trades at South Side). Non-residential uses are particularly concentrated around the harbour. Notable vacancies are the former Quayside building and the former Co-Op Homemaker building.

Considering the size of the Bridge 'town centre' area, there is a diverse range of retail uses when looking at both the use survey and at the Goad categorisation. However there is an emphasis on convenience and quick trips into the shops rather than spending time in the retail area as an experience and destination. The diversity of the Bridge Core Retail Area reflects this, with pharmacies, newsagents, sandwich shops and takeaways, for example, along the main Bridge frontage.

As a general observation, people often park up, go to one or two shops and leave again, so there appears to be a relatively short stay of shoppers with limited dwell time. This is considered as a strength of the Centre by many as it offers convenience and something different to St Peter Port (i.e. you can park up and nip in quickly at the Bridge, whereas in Town it is seen as taking much longer).

Whilst this convenience is very much valued, the current arrangements are also a significant limitation of the Bridge as a Centre, as coupled with the dis-incentive of traffic congestion around Nocq Road, there is little to attract people to the Core Retail Area as a destination or 'experience'. Clearly this balance needs to be considered carefully to both build on the strength of convenience as well as taking opportunities to improve the overall experience of shopping within the Core Retail Area.

A lack of public realm limits the diversity of activity within the Bridge Core Retail Area and Leale's Yard Regeneration Area, as there is no focal point, public art or space for markets and events.

The evening economy of the Bridge Main Centre is quite limited, both in terms of the number of businesses offering extended opening, and in terms of the variety of offering (although there are several social clubs). There are no real 'clusters' of evening activity and no significant venues for evening events or film screenings, for example, and from the consultation undertaken as part of developing the Leale's Yard Development Framework it was clear that many people would like to see more restaurants in the area.

Leale's Yard Regeneration Area will have an important role in addressing the limitations in terms of public space, public art and amenity space.

A strength of the Centre overall is the provision for industry, storage and distribution, with several Key Industrial Areas and Key Industrial Expansion Areas, which differentiates the Bridge Main Centre from Town Main Centre where office uses are more dominant in terms of employment. A further strength is the role of the Bridge Core Retail Area for convenience, but its appeal as a 'destination' or 'experience' is more limited, as is the variety within the evening economy. There are some limitations within the diversity of social and community and leisure and recreation facilities, particularly access to green public open space.



Footfall and accessibility

To be successful Centres, people need to be able to get to the Main Centres easily and travel around them easily. This is also supported by a high density resident population. Accessibility is also affected by congestion, topography, availability of parking, pedestrian and cycle infrastructure and public transport, amongst other factors.

Traffic between the two Main Centres can be very heavy at peak times and there have been repeated concerns raised by members of the public that the road infrastructure is insufficient to support the delivery of planned housing and (possible) schools development. A priority area for the Integrated Transport Strategy is improving access within the St Sampson/Vale Main Centre and Main Centre Outer Area, as well as investigating the feasibility and viability of installing a bus and taxi lane southbound between Bulwer Avenue and the Red Lion. Congestion within the Bridge Core Retail Area is an ongoing issue, particularly around the junction of Nocq Road/New Road.

The Bridge is served by significantly fewer bus routes than Town (7 routes compared to 23 serving Town). There is cycle and pedestrian infrastructure in place to assist with access to the main shopping areas of the Bridge, as well as dedicated cycle routes to St Sampson High School. The topography of the area is such that the main shopping area is largely flat which assists pedestrian and bicycle access, although the Main Centre Outer Area is more varied and includes the houghue landscape.

Footfall counts in the Bridge Core Retail Area and Leale's Yard Regeneration Area do not tend to have the benefit of visiting cruise passengers or lunchtime office workers and the counts are much lower than in Town. With no hotels in the Main Centre and only one Bed & Breakfast, there are likely to be fewer staying visitors visiting the Bridge Main Centre.

Overall, there are significant issues relating to accessibility for the St Sampson/Vale Main Centre. The Harbour Action Area may provide opportunities to address some of these issues. Development of the Leale's Yard Regeneration Area may also alleviate some of the issues by providing an opportunity to re-think some of the parking issues around the Bridge frontage.

Occupied versus vacant space

Vacant units, particularly those in a state of disrepair, can have a significant impact on the overall appearance and 'feel' of an area. A high percentage of vacant units can give a run-down impression and detract from the remaining offer, potentially discouraging investment.

Significant vacant units within the Main Centre Inner Area are the former Quayside buildings and the former Co-Op Homemaker buildings. These are large units, and particularly in the case of Quayside, prominent. The largely derelict site which forms the main development site of Leale's Yard Regeneration Area (between Lowlands Road and The Bridge frontage) is a very important site for the St Sampson/Vale Main Centre which has the potential to rejuvenate the area. If it becomes possible to create access through the Lowlands Industrial Estate to Leale's Yard (past the former Homemaker buildings) this could also be of great benefit to Lowlands Industrial Estate in encouraging passing trade and increasing footfall in that area.

There was one vacancy recorded in the Bridge Core Retail Area in 2019, which is the lowest of the surveys since 2017. As such the Core Retail Area appears to be performing reasonably well, but it is worth noting that there are several charity shops (unlike in the Town Core Retail Area).

As with St Peter Port, depending on the location of vacant buildings there are different impacts. Further, different strategies may be needed depending on the location and reasons for vacant buildings.

#### Quality of buildings and space

The St Sampson/Vale Main Centre is described within the IDP as an attractive and distinctive urban area, with an industrial, working port character. The Bridge Conservation Area Appraisal will analyse the detail of the urban environment and provide more information on this topic.

Attractive places and spaces are fundamentally more likely to be more successful (i.e. vital and viable) than unattractive places and spaces. Public realm improvements in themselves are often used as economic enablers, for example.

There are many high quality buildings in the St Sampson/Vale Main Centre, for example the villas around Delancey Park, along Grandes Maisons Road and New Road; the Guernsey Electricity buildings on Northside; and the traditional cottages on Brock Road, Ronde Cheminee and Robergerie. However the contribution of high quality buildings and space to the vitality and viability of The Bridge Main Centre is unlikely to be as high as their contribution to vitality and viability in Town where landmark buildings and formal open spaces are likely to be attractions in themselves for example to tourists and visitors to the island (e.g. Candie Gardens, Castle Cornet, or historic buildings featured on the Occupation Trail such as Grange Lodge).

Buildings within the Bridge Core Retail Area are of varying quality and interest, but taken individually there are several of high quality, such as the historic façade of Ray and Scott Jewellers and the scale and detailing of many of the retail units along The Bridge frontage. Within the Leale's Yard Regeneration Area the residential buildings and Northern Social Club are well kept and of good quality, but the main development site, with derelict warehouses/industrial units is very poor.

As noted, and in common with St Peter Port, the dominance of traffic in the Main Centre has a detrimental impact on the quality of spaces, for example in the Core Retail Area and around Leale's Yard Regeneration Area. However, quality green open spaces also exist, such as the swathe of protected Important Open Land which includes publicly accessible Delancey Park. The St Sampson's Parish Church is also of high quality, although it is in some ways isolated by the heavy traffic. There are no protected green spaces within the Main Centre Inner Area of St Sampson/Vale.

Overall there are plenty of high quality buildings within the St Sampson/Vale Main Centre and Main Centre Outer Area, but the lack of high quality spaces, particularly within the Core Retail and Regeneration Area but also across the Main Centre, impacts on the overall

impression of the Centre due to the dominance of traffic, giving the impression of a Centre that lacks coherence in parts.

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

If a Centre is unpopular then it is unlikely to thrive, and measures of vitality and viability will be affected. The IDP sees the Main Centres as socially and economically diverse, with thriving communities.

St Sampson/Vale boasts a strong sense of community and the area is well loved by many who live and work in the area. However it does not have the same appeal to visitors as St Peter Port, and is not generally perceived to be a tourist area.

#### Conclusion

The St Sampson/Vale Main Centre remains secondary to the St Peter Port Main Centre in size and scale and offers different opportunities and attractions.

The Bridge Core Retail Area appears to be performing reasonably well, with only one vacant unit at the time of survey, and with the opening of Co-Op Locale on the Bridge frontage has strengthened its role for convenience shopping. However until Leale's Yard is developed or the issues of traffic conflict are resolved, there is a limit as to the extent the Centre can succeed.

The Leale's Yard Regeneration Area and St Sampson's Harbour Action Area offer potential to attract inward investment and to improve the public realm and reduce the dominance of traffic at the Bridge, as well as reducing conflict between the different road users. These areas also offer opportunities to increase the range of amenities, facilities, services and employment types to serve and support the, at present, dominant residential population and improve the sustainability of this Main Centre.

Overall, the area has a high level of interest and there are clear opportunities to enhance the St Sampson/Vale Main Centre to support its role, which is secondary to St Peter Port. The strong sense of community in the area is a great asset, however there are currently clear limitations to the ability of the Centre to meet the needs and aspirations of the community and the intentions of the IDP of a mixed use, vibrant Centre due to issues of accessibility and public realm, and the lack of 'experience' within the Bridge Core Retail and Leale's Yard Regeneration Area.

## Overall Conclusions on the Main Centres

Town and the Bridge Main Centres both have many positive features and characteristics, but there is clearly scope for improvements and issues around traffic, accessibility and public realm continue to dominate.

Opportunities exist to improve the public realm in both Main Centres, particularly within the Core Retail Areas, Harbour Action Areas and Regeneration Areas, whilst access to public open space more generally is an ongoing issue, with just one park in the Bridge Main Centre (Delancey Park) and those in Town Main Centre concentrated on the northern edge of the Main Centre Inner Area (Cambridge Park, Candie Gardens). Diversity in the evening economy could be improved, particularly in the Bridge Main Centre.

Both of the Main Centres would benefit from addressing conflict between road users, in particular the dominance of traffic and parking at the Harbours which reduces the potential of the linking the retail areas with the waterfront. The SLUP, as well as the Vision for Town and the Bridge, places an emphasis on improving the quality of the public realm in both of the Main Centres as a means to enhancing vitality and viability. There are opportunities for pedestrianisation and the related potential to increase dwell time of shoppers in both Main Centres, but public realm improvements at the Bridge could be particularly significant as a mechanism to improve the vitality and viability of the Centre, whilst also building on the strength of the Bridge Core Retail Area as a centre of convenience.

As well as the conflicts between road users, there is a general issue of capacity of road and transport infrastructure that has been raised, particularly in relation to the Bridge and which emerged as a priority in the Integrated Transport Strategy review.

Vacancies have continued to rise in Town, whilst in the Bridge Core Retail Area they have fallen, notwithstanding some prominent vacancies in the Main Centre Inner Area (former Quayside and former Homemaker).

The quality of the individual buildings was generally high in both areas, although Town is particularly attractive with a high level of detail in the shop fronts and individual units. In the wider Town Main Centre there are high quality buildings and open spaces which in themselves may attract visitors, sometimes because they are associated with historic or fictional events. This is less the case in the Bridge Main Centre, where buildings and spaces are also of a high quality but perhaps have less of an individual appeal to tourists. The condition of buildings in both Main Centres is generally high and there is evidence of ongoing investment in both Centres.

## Appendix 1: Research Tools and Techniques

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

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



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

### 1: Vibrant

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

### 2: Active

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

### 3: Dull

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

### 4: Inactive

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

### 5: Monument

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

**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](mailto:planning@gov.gg)

**Have you visited our website?** Go to [www.gov.gg/planningandbuilding](http://www.gov.gg/planningandbuilding) for additional information on the Island Development Plan, Supplementary Planning Guidance (including Development Frameworks), Annual Monitoring Reports, Quarterly Monitoring Reports and other relevant evidence reports.

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