

LERWICK TOWN CENTRE HEALTH CHECK



February 2018



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1. Background and Introduction

The Lerwick town centre health check was undertaken by the Council's planning service during the months of July to October 2017. This is the first health check that has been undertaken for Lerwick. It will be used to inform the emerging Local Development Plan (LDP2) and decisions on planning applications. The Council's planning service, in particular the Development Plans Team, shall work with stakeholders, including Living Lerwick, to monitor town centre performance and update the health check as and when necessary.

What is the Purpose of a Town Centre Health Check?

Scottish Planning Policy (SPP) requires that local authorities, working with community planning partners, businesses and community groups as appropriate, should prepare a town centre health check. The purpose of a health check is to assess a town centre's strengths, vitality and viability, weaknesses and resilience. SPP recommends that health check are produced every 2 years.

Town centres that provide a variety of shops and services can help attract investment and more people, and also promote a sense of well-being and identity. It is therefore important that Lerwick town centre remains an attractive and viable place for the residents of Shetland and visitors. As we now have much more choice on how we chose to shop and spend our leisure time it is essential that it adapts to meet our changing lifestyles and habits.

What have we used to help us do the Health Check?

To help undertake the health check we have used and adapted the indicators which are provided in SPP to help assess the vitality and viability of the town centres. The indicators include important physical measures such as pedestrian footfall counts, population, vacancy rates and the range of services provided in the town centre. They also include more subjective measures such as appearance, attractiveness and the quality of retail and service provision.

How will the findings be used?

The Council supports the ongoing regeneration and development of Lerwick town centre to help ensure its future vibrancy, vitality and sustainability. Our current Local Development Plan (2014) highlights that the town centre lies within a Conservation Area and provides an important function as a cultural and administrative centre for Shetland. It is therefore important that it is maintained, promoted and developed to meet the needs of the community.

The findings of the health check will be used by Living Lerwick, the community and Council services to develop a strategy which identifies town centre improvements. The findings will also inform the LDP2 Main Issues Report that will be published for consultation in 2018. The spatial elements of the strategy, such as town centre boundaries, prime retail frontage areas and development opportunities will be contained in the LDP2 Proposed Plan which is due to be published in 2019.

2. Extending the Lerwick Town Centre Boundary

Scottish Planning Policy requires that development plans identify as town centres those centres which display:

- a diverse mix of uses including shopping;
- a high level of accessibility;
- qualities of character and identity which create a sense of place and further the well-being of communities;
- wider economic and social activity during the day and in the evening; and
- integration with residential areas

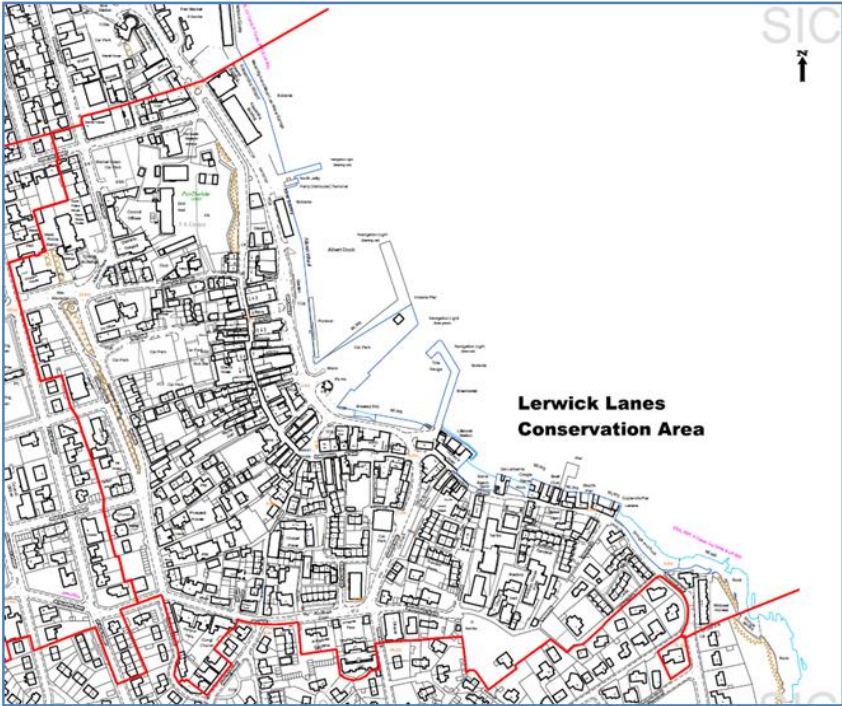
In previous Local Development Plans the Lerwick town centre boundary has been defined by the Lerwick Lanes Conservation Area. For the purposes of the town centre health check we have extended the boundary to the north to incorporate a mix of additional uses.

The extended boundary used for the health check now includes additional properties on the east side of Market Street, the Lerwick bus station, office development at north ness, Mareel, the Shetland Museum and Archives and some businesses/retail properties on Commercial Road.

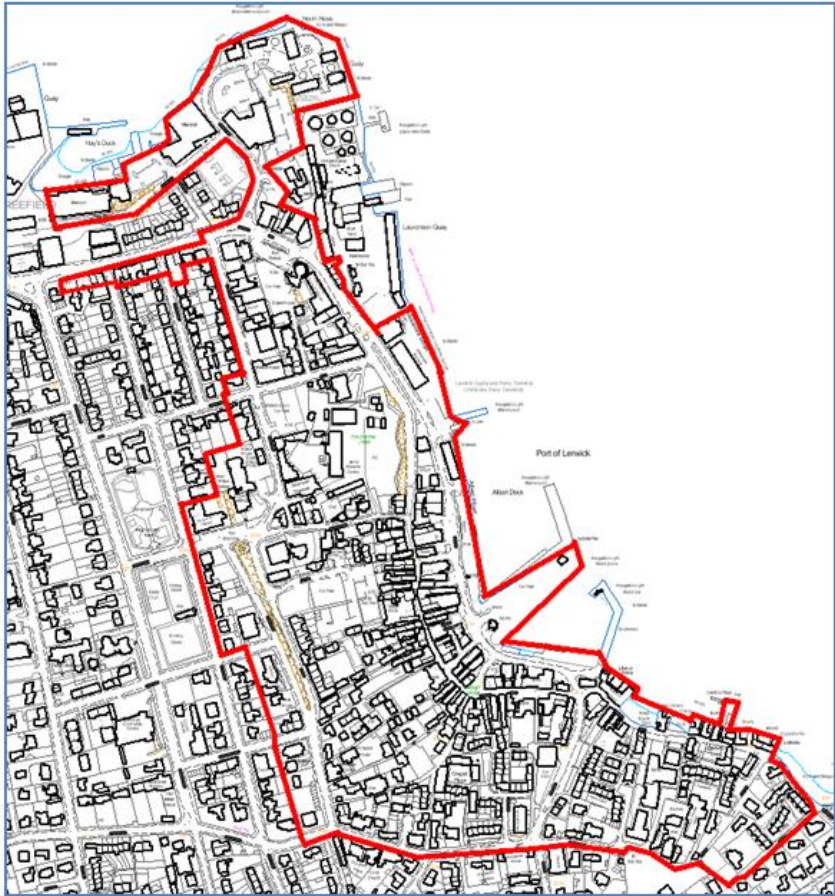
We consider that the extended boundary displays the above town centre qualities referred to in Scottish Planning Policy and is considered to be within adequate walking distance of the town centre. For example, to walk from the car park below Fort Charlotte to the northernmost part of the boundary takes approximately 5 minutes walking time and is just under 500m in distance. Mareel is located approximately 400m away from the Fort car park, and the Museum is 500m away.

Land currently used for industrial and port related activities (oil distribution depot, the Malakoff and the current fish market) has been left out at this stage. The finalised town centre boundary will be considered further and be subject to public consultation through the LDP2 process.

Current town centre boundary



Revised (Draft) Boundary for Purposes of Health Check

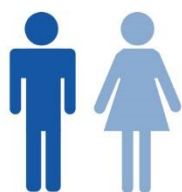


3. Town Centre Population

The extended boundary was used to estimate the population of the town centre. Population data from the 2011 Census was taken from the following dataset areas:

Area	Approximate Geography
S00129087	Commercial Road, North Ness Business Park
S00129058	Esplanade, Harrison Square, Commercial Street, Hillhead, Prince Alfred Street
S00129056	Bank Lane, Hangcliff Lane, Pirate Lane
S00129053	Esplanade, Commercial Street, Mounthooly Street, Church Road
S00129054	Commercial Street, Stout's Court
S00129055	Greenfield Place, Water Lane
S00129059	Charlotte Street, Hill Lane
S00129051	Hillhead, Queen's Lane
S00129049	Gardie Lane, Queen's Lane, Nornas Court

The total population is **755**, of which there are 396 males and 359 females. Lerwick's overall population in the 2011 census is 6928.



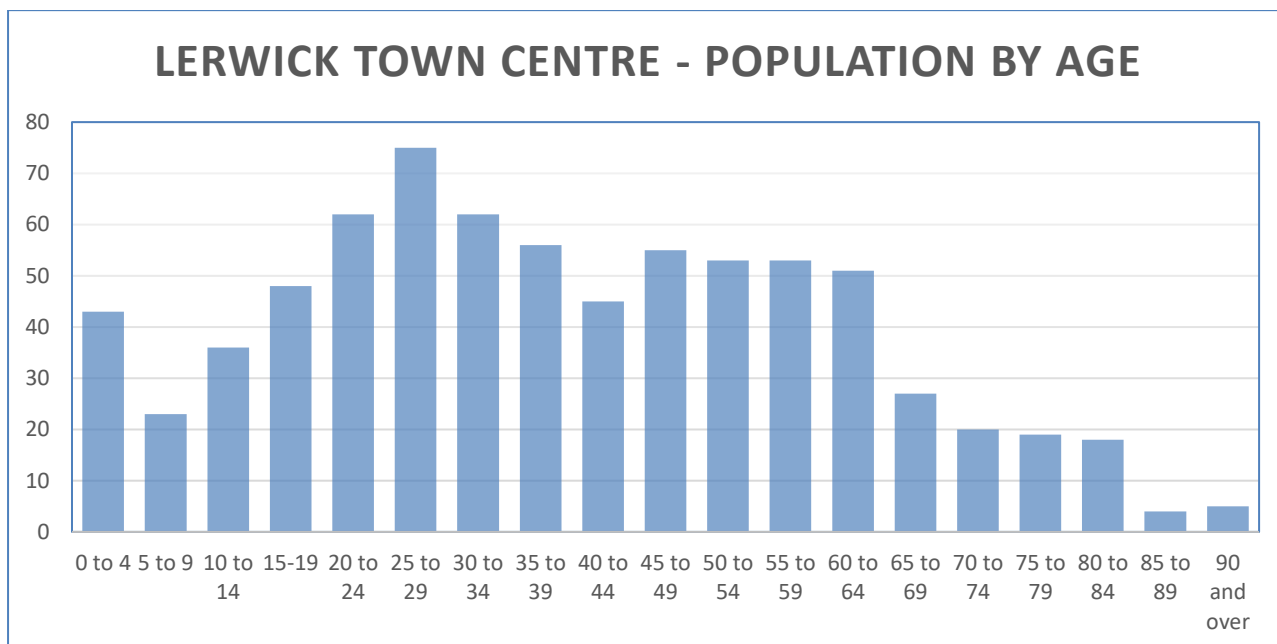
755
Total Population



396
Males



359
Females



Summary of Key Findings from 2011 Census Data

- On the whole the population of the town centre is younger than the Shetland average. The highest proportion of the population in the town centre is aged between 20 and 34, while the Shetland average is between 45 and 60.
- Young population (between 0-15) is 153.
- Working age population (15-65) is 560
- Elderly population (65 and over) is 93.
- The town centre has a high population density with the largest proportion of households consisting of blocks/tenements (123), semi-detached (101) and terraced housing (80). Detached housing consists of 68 units.
- The highest proportion of homes are made up of married couples with or without children (213) units. There is also a high number of people occupying one person households (179).
- The Census identified 35 vacant households in the town centre area, with 11 properties being used as a second residence or holiday home.

4. Lerwick Business Improvement District (BID) and Living Lerwick Ltd

Living Lerwick was formed in 2012 to develop a Lerwick town centre Business Improvement District (BID). All properties in the defined BID area are automatically members of Living Lerwick. On 25 August 2017 a second ballot was held and town centre businesses voted that the BID should be continued for a second term until 2021.

Businesses in the BID area have voted to invest collectively in local improvements over and above those provided by statutory authorities. The BID provides a partnership arrangement where the local business community and the statutory

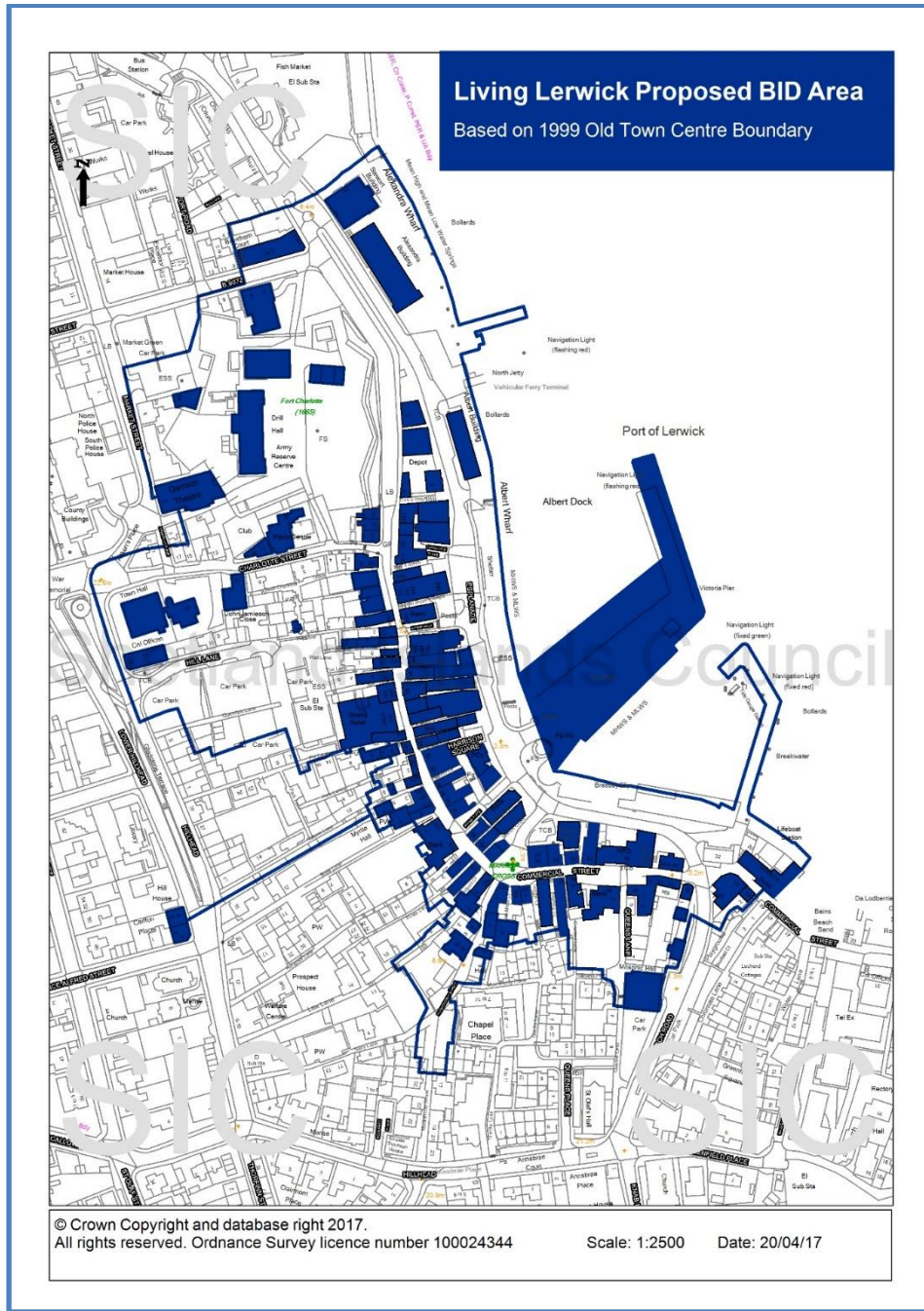
authorities work together on projects that will benefit the local economy and local businesses.

Based on surveys of businesses in the BID area Living Lerwick has 5 key objectives:

1. **More Footfall:** To increase footfall in the town centre through large and small events.
2. **More Marketing:** To increase promotion of the town centre and particularly its businesses.
3. **More Informed Decision Making on Access:** To lobby local and national government for a workable solution to parking control so that customers can access premises easily.
4. **More Attractive:** To provide more seating, an annual flower scheme and Christmas lights and work with others towards physical improvements, making Lerwick town centre a nicer place to be.
5. **More Business Support:** To provide more business information, networking opportunities, training opportunities, advocacy issues facing business and encourage inter-business working.

In total there are currently 143 non-domestic properties in the BID area which generate a levy of £71,050 per annum. More information on BID projects, BID surveys, how the BID is run and its future objectives can be found on the Living Lerwick website at: www.livinglerwick.co.uk/

A map of the current BID area is shown overleaf:



5. Health Check Indicators - Scores and Description

Six categories have been used to help undertake the health check and an average score has been taken for each from the 32 indicators. This shows that Lerwick town centre has scored 2.9 out of 5 for its first health check. Future health checks will provide the opportunity to monitor and assess whether the town centre has improved or declined in these areas.

Category	Score
Retail & Professional Services	2.9/5
Activity	3/5
Physical Environment	3/5
Property	2.5/5
Accessibility	2.7/5
Community	3/5
Overall	2.9/5

More detailed information on each of the indicators and categories is provided below:

Retail/Professional Services

1. Number of Multiple Retailers = 2

The presence of multiple retailers can help improve the attractiveness of a town centre to visitors and shoppers although their presence can impact negatively upon the success of independent and specialist shops.

There is a small range of multiple retailers currently operating within Lerwick town centre and serving the population, however this is countered by the relatively high number of independent and specialist shops.

Multiple retailers include Boots, M & Co, Specsavers, and Intersport. Outside the town centre two established supermarkets (Tesco and Co-op) operate and will have diverted some trade from the town centre due to the variety of goods which they sell.

2. Variety of Specialist and Independent Shops = 3

There is range of specialist and independent shops operating within the town centre which offer a variety of goods for sale. In total there are 58 shops that sell comparison goods. Of these a relatively high proportion, 13 (22%), specialise in crafts and gifts.

Living Lerwick commissioned a survey members of the public in 2010. 200 people were interviewed to assess their opinions of the town centre and find out what could be done to enhance the town centre and give them more incentive to visit. The survey found that 36% of people cited the lack of variety and availability of goods and services as a negative impact on them visiting the town centre. This was ranked 3rd, behind the availability of other shopping areas in Lerwick (39%) and use of the internet/mail order shopping (69%). More information on the survey is available on the Living Lerwick website:

www.livinglerwick.co.uk/site/assets/files/1205/survey_summary.pdf

3. Retailer Demand = 2

A number of retail properties and businesses have remained on the market for a long period of time before being sold or leased. Examples include da noost, fine peerie cakes, the harbour fish and chip shop and tatties and point, some of which remain vacant.

Properties which have opened or received planning permission during the period of the period of the health check include a food takeaway outlet (133 Commercial Street), a delicatessen and café (98 Commercial Street) and a café (5 Mounthooly Street).

Retailer demand is also affected by the availability and suitability of premises for particular uses. The constrained nature of the street and layout of premises may deter certain retailers and types of businesses from locating in particular locations in the town centre.

4. Diversity of Retail on Offer = 3

Living Lerwick commissioned a 2010 survey of town centre businesses (employers and employees) to which 378 responses were received. The survey found that 'variety and availability of goods and services' ranked as the highest negative impact on spend in the town centre (56%). For the town centre survey of members of the public this ranked as the 3rd highest negative impact.

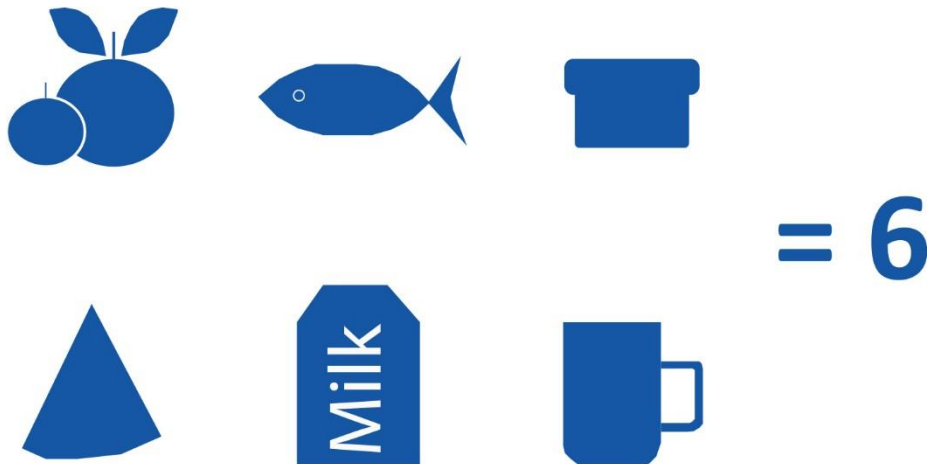
The health check found that there is a reasonable range of shops in the town centre which provide a variety of retail goods beyond those provided by supermarkets. The town centre includes shops that sell items such as, clothing, shoes, DIY, specialist gifts, garden equipment, photography, jewellery, furniture, homeware, music equipment, cookware, books and marine supplies/fishing equipment.

Information was collected on the number of retail units in the town centre. This was broken down into 2 categories – convenience retail and comparison retail:

- Convenience Retail - consists of retail units/shops which primarily sell low cost goods that are typically bought out of habit or on impulse, such as food, drink (alcohol and non-alcohol), newspapers and tobacco.
- Comparison Retail - consists of other retail units/shops which sell goods which are purchased at infrequent intervals where consumers will compare and contrast products and prices. Examples include clothes shops, furniture shops, gift shops, pharmacies, charity shops, electrical products, shoe shops, health and beauty shops and DIY.

The findings are as follows:

There are 6 Convenience shops which currently operate in the town centre



There are 54 comparison shops which currently operate in the town centre



In addition to the above, research undertaken by Understanding Scotland's Places, which is available at: www.usp.scot/Town?mainTownName=lerwick highlights that Lerwick has an above average diversity of retail and number of shops when compared to other similar towns in Scotland, such as Oban, Fort William and Newton Stewart.

5. Availability of Food Shopping = 2

When compared to the number of comparison shops, there is generally a low availability of food shopping within the town centre, with only a handful of convenience shops that sell food. The number of shops has declined over time as habits have changed with more people using supermarkets for convenience shopping. Businesses such as butchers and bakers are no longer located along the main retail core of Commercial Street, although there is a butcher on Commercial Road which is in walking distance of the town centre.

As at 6th November 2017 there were only 5 shops operating in the town centre boundary which predominantly sell food products, consisting of McNabs fish shop, Don Leslies, JJ Taylors, Beberly's World Foods and Anderson's butchers. The other convenience store not selling food products is the wine shop.

6. Diversity of Services = 4

Town centres need to provide a good range of services to draw people in through necessity and choice. They therefore have an important role to play in attracting people and increasing footfall. Information collected shows that there are 58 businesses/units which provide services in the town centre.

There are 38 businesses which provide professional & technical services



This includes:

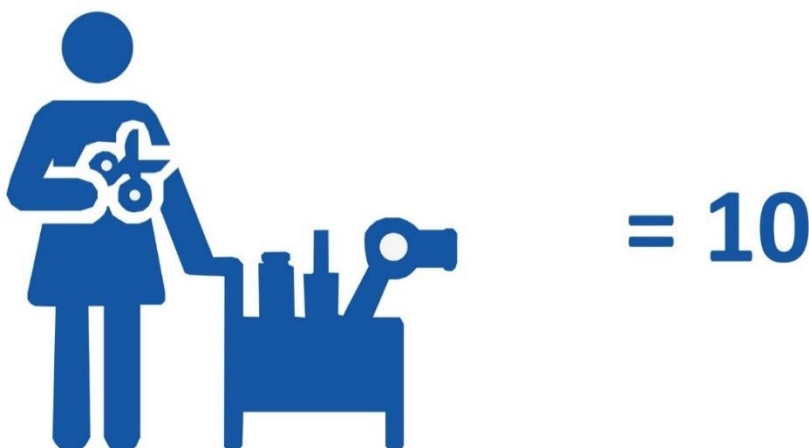
- 15 businesses that provide property/financial/legal services. For example solicitors, architects, financial advisors.
- 13 which provide technical services such as IT, broadcasting, engineering and marine engineering.
- 5 'other' professional services, which consists of 2 opticians, car rental, a vet and a tourist office.
- 5 banks/building societies.

There are 10 businesses which provide public services



- Public services located in the town centre include governmental and non-governmental agencies (SEPA, Historic Scotland and SNH, SFPA), Shetland Islands Council offices, Hjaltland Housing Association and the Post Office.

There are 10 businesses which provide health and beauty services



This includes:

- 7 hairdressers, 2 beauticians and 1 tattooist.

7. Scarcity of Charity Shops = 3

A proliferation of charity shops within a town centre can be an indicator of retail decline, although they can perform an important function of using premises which could otherwise be vacant. There are currently 4 charity shops in the town centre. This equates to (7%) of the total number of retail units (convenience and comparison).

8. Lack of clustering & proliferation of betting shops, money lending etc. = 5

Clustering of non-retail uses, such as betting offices and high interest money lending premises has become a concern in some town centres in Scotland. This does not appear to be an issue in Lerwick town centre as there is only one betting shop and there are no high interest money lending premises.

Activity

9. Presence of Cafes, Restaurants and Pubs = 3

The town centre has a reasonable variety of cafes, restaurants and pubs, although some were vacant or for sale/lease at the time of undertaking the health check. A number of bars and restaurants are also provided within the hotels that are located in the town centre. In total, within the town centre boundary, there are:



- 9 pubs/premises that sell alcohol.
This includes 3 bars in hotels.



- 10 restaurants, This includes 3 restaurants in hotels.



- 9 cafes.

10. Presence of Cultural and Community Facilities = 4

The town centre is well served by these facilities which provide hubs for community activity and can generate trade for other businesses. Facilities provided include a cinema and music venue, museum, library, theatre, town hall, Lerwick Community Council offices and an independent commercial art gallery. Additionally, some Council services are located in or near to the town centre and there are also a number of churches and halls. The Islesburgh Community Centre is located just outwith the town centre boundary.

Lerwick's Cultural and Creative Quarter



The Knab masterplan may provide the opportunity for additional cultural and community facilities to be located near to the town centre.

11. Leisure and Tourism Facilities = 3

A variety of facilities are located in the town centre which provide services for visitors. This includes a tourist office, seasonal cruise ship visitor facilities, the Shetland museum and archives, mareel, taxi rank, the Lerwick boating club and tour operators. There are also a number of hotels, bed and breakfasts and visitor accommodation.

12. Properties above Retail/Business = 3

The Scottish Government's Town Centre Action Plan supports town centre living in order to encourage more people to live in town centres. Having residential properties on upper floors can have positive impacts on the vitality of town centres and can help support an evening/night time economy. A growing residential

community can also help support shops and businesses. The 2010 Lerwick Lanes Conservation Area Character Appraisal noted that upper floors of properties appear to be generally underused and remarked that a detailed survey of vacancy would prove useful.

From a visual inspection of the town centre a number of properties have residential use on the upper floors, although there appears to be potential for more to be developed. In the last few years the Hjalmland housing association has converted properties or built new properties in or near to the town centre. There are also a number of holiday lets above retail/business in the town centre.

Example of Properties above Retail/Business in the Town Centre



13. Evening/Night Time Economy = 2

The 2010 Living Lerwick survey of members of the public found that 28% highlighted opening hours as an impact on them visiting the town centre. This was ranked as the 5th highest negative impact.

The town centre is only particularly busy in the evening during weekends, with restaurants, takeaways and pubs opening late. The majority of shops and cafes close at 5pm and through the week the street becomes very quiet after this time with little footfall. Evening cultural events and cinema screenings are held at Mareel, although this has little impact upon footfall in the town centre as they will be predominantly accessed by car.

Other than the Market Cross and Harrison Square, there is a lack of public spaces which can accommodate evening and night time events. Further consideration should be given to how the evening and night time economy could be improved in the town centre. Potential actions could include late night opening of shops, improved lighting schemes and additional space or locations for events (particularly during in the summer months).

Physical Environment

14. Space in use for range of town centre functions and how it has changed = 3

Policy ED3 of the Shetland Local Development Plan (2014) recognises the important function that the town centre plays and it supports the ongoing regeneration and development of the Lerwick town centre to ensure the future vibrancy, vitality and sustainability of the area. Due to the restricted nature of the town centre and lack of available space to develop, the functions in the town centre have remained the same for some time. Opportunities can arise when larger sites become available or buildings are demolished and replaced. Recent examples include office developments at North Ness and housing developments on Fort Road and Harbour Street.

In the future additional opportunities may arise. One potential site is the current fish market which will become vacant following its relocation to Mair's pier. However, this land is owned by the Lerwick Port Authority and is likely to remain in use for port and harbour related activities. Another potential site for redevelopment is the British Telecom building at Water Lane/Greenfield Place, which covers a large area of land. Both of these potential sites will be considered further when we take forward the next Local Development Plan (LDP2).

Harrison Square has been promoted by Living Lerwick as a location for stalls and markets, however there have been issues raised with the cost of hiring the stalls and this proposal has not materialised to date. There is potential for this initiative to be re-visited in the future, including the consideration of alternative areas or buildings to site the stalls, including Fort Charlotte.

Possible Future Development Opportunity



15. Visitor Infrastructure (Street Signs and Furniture) = 3

A high standard of factual signage and visitor information on Lerwick is provided at Harrison Square. Throughout the town centre further signage directs people to facilities such as the museum, public toilets and library. There is also an information board at the Market Cross.

A good amount of seating/street furniture is provided along the esplanade, and there is further seating at both ends of the street. Due to the restricted nature of the street/esplanade there is a lack of space for larger gatherings of people (e.g. seating outside cafes, restaurants, bars and open spaces), although Harrison square and the market cross are used for specific events such as shopping week and the Christmas parade.

There is currently no seating and a lack of interpretation provided at Fort Charlotte. This should be considered as a potential area to improve visitor infrastructure.

Harrison Square Information Boards



16. Physical Structure = 3

One of the greatest threats to any town centre is the deterioration of the primary fabric of the physical environment and buildings through decay and damage. From a walk-through inspection the physical structure of buildings is generally good, although there are some properties which appear to be in need of repair, e.g. gutters, roofs and windows. A more detailed and up-to-date survey would be helpful, to inform any future funding applications for built environment and heritage improvements.

The [Lerwick Lanes Conservation Area Character Appraisal \(2010\)](#) noted that a number of buildings, predominantly on the waterfront, are suffering stone erosion due to the use of cement mortars and renders in the saline environment of the

harbour. This type of damage can lead to more serious problems over time and is best dealt with early. The appraisal also identified the Lerwick lanes being in various states of condition, metalwork such as railings and downpipes being in poor condition on some buildings and street paving being replaced with areas of tarmac.

17. Appearance of Buildings = 3

The majority of buildings and shopfronts are of good quality and contribute to the architectural quality of the town centre and Conservation Area, although some buildings would benefit from re-painting and repairs to walls. The Council has published [Draft Supplementary Guidance on the Historic Environment](#) which includes policy on shopfronts in Conservation Areas and advertisements and signs, which is used to guide planning decisions.

Some buildings would benefit from repainting



18. Cleanliness/Attractiveness = 3

The waterfront location and the high quality historic environment add to the attractiveness of the town centre.

The Living Lerwick Baseline Survey of Businesses, undertaken in 2011, ranked improvements to cleanliness as the 3rd highest priority for the BID to improve. The BID Scheme Levy has been used towards making the town centre more attractive.

This has included the provision of hanging baskets, bunting, street furniture and gutter cleaning. There are further proposals by Living Lerwick to provide more artwork, low carbon lighting and wi-fi coverage throughout the town centre. The town centre would also benefit from improved 4G mobile coverage.

The main core of the town centre and outlying areas are generally well maintained and free of litter. However, some areas of the town have potential to be improved. This includes:

- Some of the lanes, including railing and lighting.
- Gap sites/disused sites.
- Maintenance of buildings (e.g. painting and repairs).
- Road/street markings.
- General maintenance such weeding and painting of street furniture.
- Lighting.

Gap Site in the Lanes



Commercial Street was re-flagged with Caithness stone as part of a Heritage Lottery Funded project in 1999 and the stone slabs complement the historic buildings. In places stone slabs have been replaced with areas of tarmac where works have been carried out, detracting from the otherwise high quality public environment.

Paving at the North End of Commercial Street



19. Historic Environment = 4

Lerwick town centre contains a very high standard historic environment with two conservations areas, a scheduled monument (fort charlotte), and a wealth of significant landmark buildings such as the Lodberries, Town Hall, Police Station and Sheriff Court, Grand Hotel, Queens Hotel, Bank of Scotland, Royal Bank of Scotland and the Post Office. As previously mentioned, there are a few poor quality spaces in the lanes which detract from the otherwise high quality historic environment. In addition to this some buildings, railings and lighting could be improved.

The Category A'Listed Lodberrie



As at September 2017 the [Buildings at Risk Register](#) identified 4 'at risk' properties that fall within the town centre boundary:

Property	Listing	Condition	Risk
The Lodberrie, 20 Commercial Street	A	Poor	Low
St Clements Hall, St Olaf Street * ¹	B	Fair	Low
Storehouse, Market Green Car Park	Unlisted	Poor	Low
Harbour Court, 8 Harbour Street* ²	Unlisted	Poor	Moderate

*1 - St Clements - a planning application for change of use to photographic studio and offices was granted in 2014, but was not initiated within the required timescale.

*2 - Harbour Court - has been recently refurbished. A retrospective planning application approved on 14 August 2017 and consent is currently being sought for change of use to a residential unit.

20. Availability and Quality of Public Space and Green Infrastructure = 2

The dense nature of the town centre means there is little public open space or opportunities to create additional public space and green infrastructure, with the exception of Fort Charlotte. Seating along the esplanade and at Harrison Square attracts people on finer days. There is also some seating outside Mareel, next to the waterfront, which functions as a public space during the summer months.

In March 2017 a community garden and playground was granted temporary planning permission (5yr maximum) at Pitt Lane. This area is well maintained, reasonably sheltered and provides seating and tables. It appears to be quite well used. The King George V Play Park and Jubilee Flower Park provide facilities and an attractive environment in close proximity to the town centre boundary.

Community garden at Pitt Lane



Property

21. Low Vacancy Rates = 2

Information on vacant properties was provided by the Council's finance department, estate agent websites and from a walk-through inspection of the town centre. As of October 2017 there were 16 vacant properties in the town centre, of which 3 are currently on the market. There are also 9 properties in the town centre which don't appear to be open for business, but are not on the market. The town centre therefore has a relatively high number of vacant properties, some of which have remained vacant for a long period of time.



25 Vacant Properties

- 14% of all businesses located in the town centre are currently vacant.



8 Vacant Shops

- 13% of all shops are vacant in Lerwick Town Centre.
- This is above the Scottish average vacancy rate of 8.7% (October 2017).

Registered Vacant Properties in Town Centre

Premises	Address	Additional Info
Shop	63 Commercial Road	Adjacent to Happy Haddock
Warehouse	68 Commercial Road	HNP. Proposed site for UHI student accommodation
Office	66 Commercial Road	HNP. Proposed site for UHI student accommodation
Workshop	Commercial Road	HNP. Proposed site for UHI student accommodation
Office	43 Commercial Street	Previously Clive's record shop.
Office	95 Commercial Street	Above Jamiesons Knitwear
Office	122 Commercial Street	Former Baker Tilly offices
Store	Esplanade	Formerly the Spinning Wheel
Office	Hillhead	Office within County Buildings
Office	2 Hill Lane	To rear of John Coutts
Office	11 Market Street	Former Support Training Ltd office
Store	North Ness	Adjacent to Malakoff
Office	North Ness	Office in Gutter's Hut building

Vacant Properties Currently on the Market for Sale or Lease

Premises	Address	Additional Info
Shop	123 Commercial Street	Previously Tatties and Point
Office	7 Mounthooly Street	Previous Living Lerwick premises
Office	Nordhus, North Ness	Office space in occupied building

Other Vacant, Empty or Closed Properties Currently not on the Market

Premises	Address	Additional Info
Shop	98 Commercial Street	Application approved for change to delicatessen/café
Public House	86 Commercial Street	Da Noost with flat above (recently sold)
Shop	155 Commercial Street	Stage Door
Shop	165 Commercial Street	Dennis Coutts
Shop	141 Commercial Street	Antique shop
Café	44 Commercial Street	Previously part of Faerdie-Maet
Shop	177 Commercial Street	Previously International Taste
Shop	49 Commercial Street	Previously Antique Shop
Restaurant	88 Commercial Street	Previously Monterey Jack's

22. Low Number of Vacant Sites = 3

There are a few gap sites or vacant sites within the town centre. Notable sites and buildings with possible development potential are the BT exchange building on Water Lane, of which part appears to be vacant and 66-72 Commercial Road (former HNP Engineering premises), which was granted planning permission for student accommodation in 2016.

23. Committed Developments = 3

The majority of committed development (i.e. development which has been undertaken in the last 5 years in the town centre) has involved repairs and modifications to buildings. Within and adjacent to the town centre boundary there have been a number of implemented planning permissions for residential development by the Hjaltland Housing Association and private developers:

- 27 one bedroom flats on King Harland Street (Hjaltland).
- 17 one bedroom flats at Fort Road (Hjaltland).
- 14 flats and shop on ground floor at 74 Commercial Road (Private).
- 8 serviced apartments at 91-93 St Olaf Street (Private).
- Conversion to 5 residential units, Leog House (Private).

Unimplemented consents include student accommodation at 66-72 Commercial Road, a change of use from retail to a cafe and conversions of offices and shops to residential accommodation on Commercial Street. The Masterplan for the Knab will provide a major opportunity for a mixed-use development in Lerwick. It will be important to ensure that this development contributes positively to the vitality and viability of Lerwick Town Centre.

The Knab Masterplan Site



24. Commercial Yield and Prime Rental Values = 2

Information on the non-domestic rateable value of properties in the town centre was taken from the Scottish Assessors' Association (SAA) [website](#). Rateable Value is defined as the rent that a tenant might be reasonably be expected to pay for the property on a year to year basis).

Based on the SAA information for town centre shops, the majority of small to medium size premises fall within the £4000-£8000 range. Larger premises fall within the £8000 to £20000 range, although the highest is Mackays clothes shop which has a rateable value of £42,000.

Further information on the state of the rental market was sought from assessors and estate agents, but was not received.

Accessibility

25. Pedestrian Footfall = 2

Pedestrian footfall is a key indicator of the health of a town centre and the results of surveys can be used to analyse important measures such as how the vitality of a town centre has changed over time and whether particular initiatives have been successful. Pedestrian counts can also help determine the potential for new businesses locating in the town centre.

Living Lerwick have undertaken a range of initiatives to increase footfall in the town centre. Examples include the introduction of a shopping week, heritage trail, and themed events. However, there is a general feeling from members of the public and

shop owners that footfall is continuing to decrease and this may be attributed to the increase in vacant properties in the town centre.

As no previous footfall surveys have been undertaken for Lerwick town centre, we are unable to compare data. However, the data compiled by our surveys will be used in future health checks to determine whether town centre vitality is improving or declining.

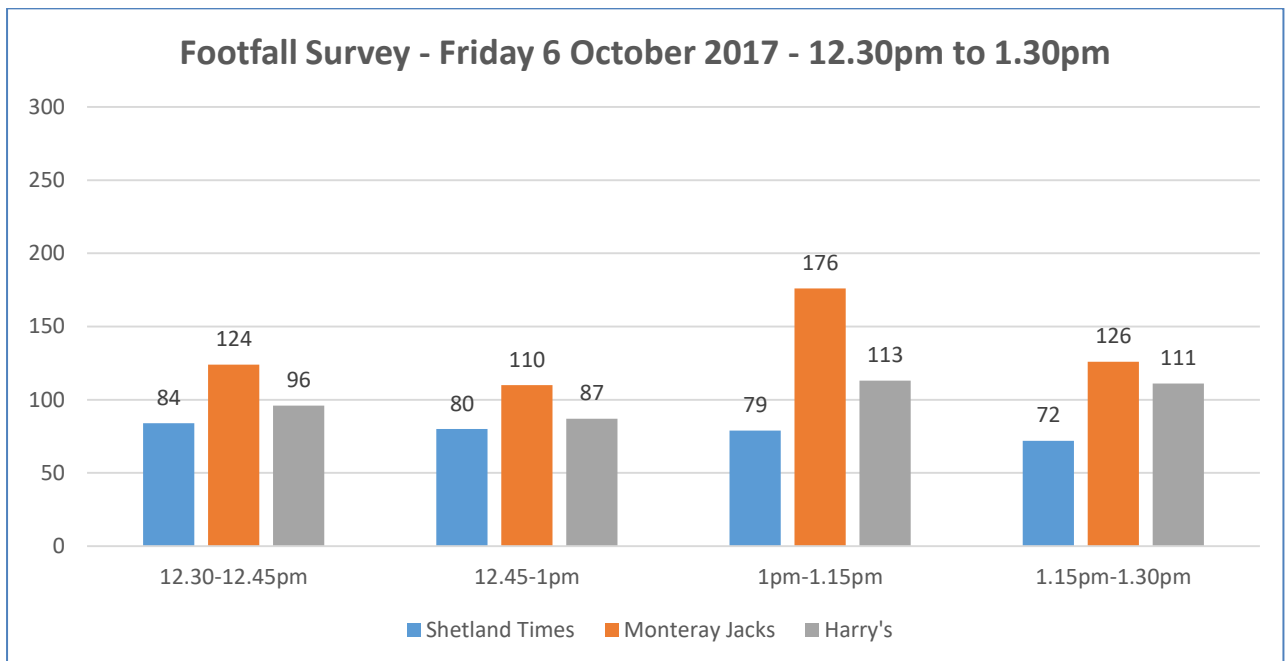
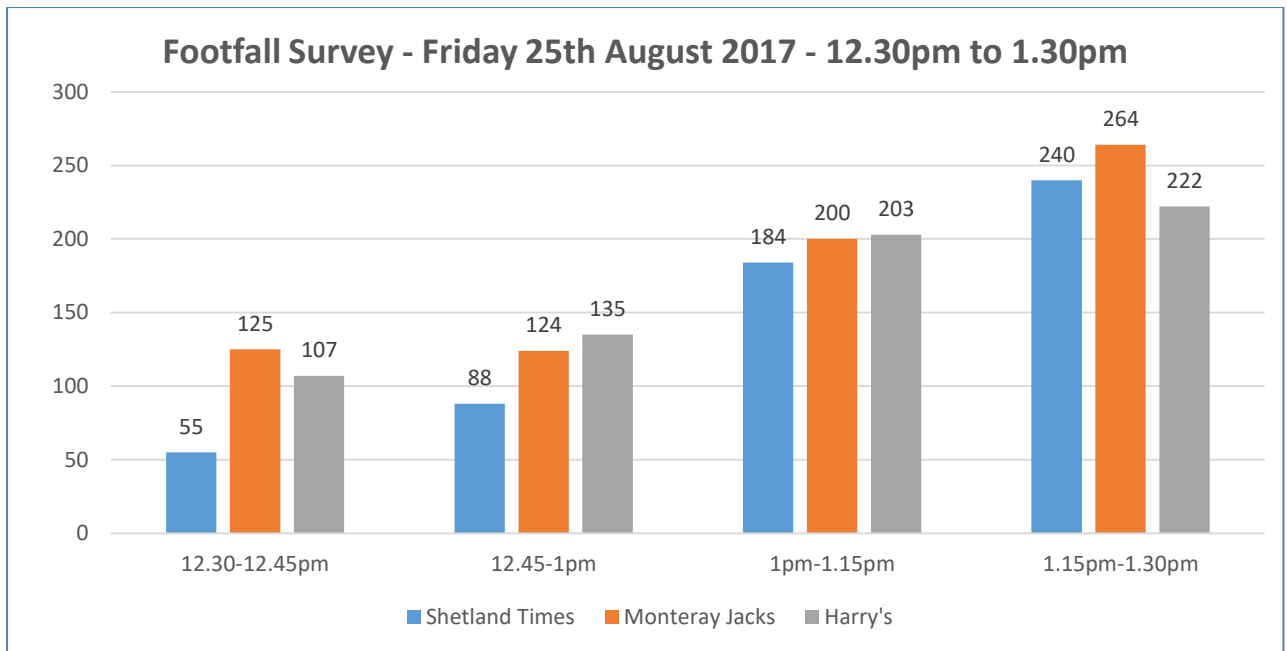
Footfall can be defined as the movement of people past a particular location over a specified period of time (e.g. average hourly counts). Data was collected at different times of day (peak/off peak) and on different days of the week in 3 preselected locations along Commercial Street. Plans of the footfall survey locations are provided in Appendix B. Two main surveys were undertaken at 3 locations on Friday 25 August 2017 and Friday 6 October 2017. Additionally, further surveys were undertaken at the mid-point of Commercial Street on a Tuesday and Wednesday afternoon. The survey also compiled information on vehicle use of the street.

Pedestrian Footfall Surveys – 25 August and 6 October 2017

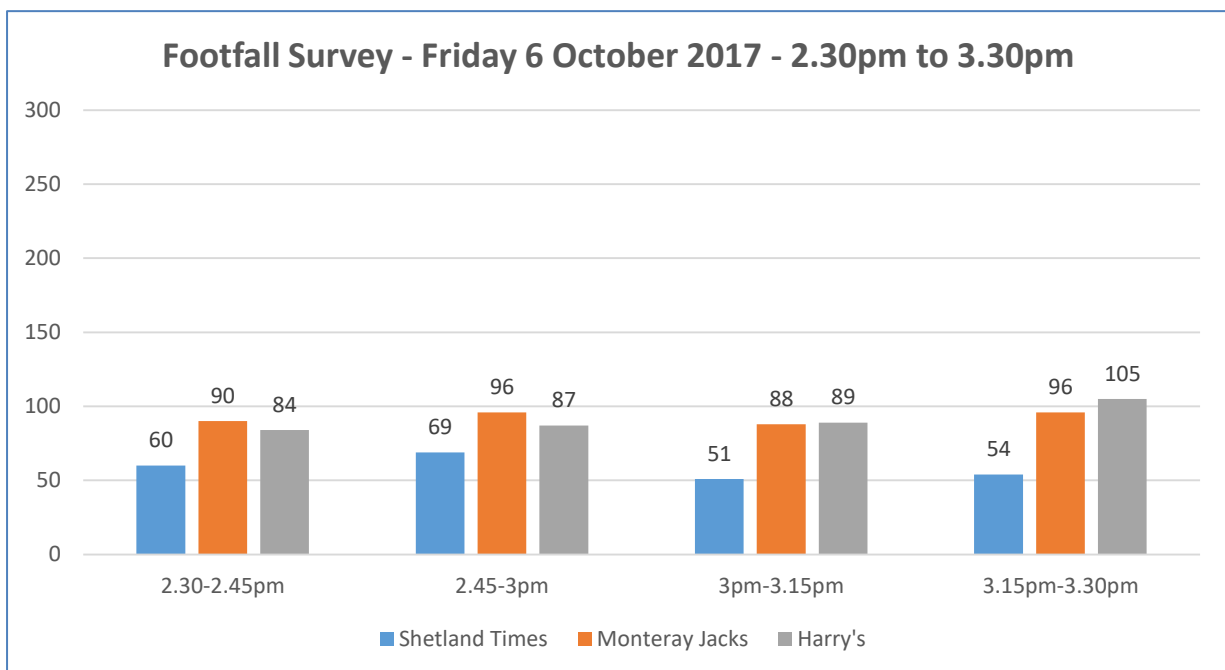
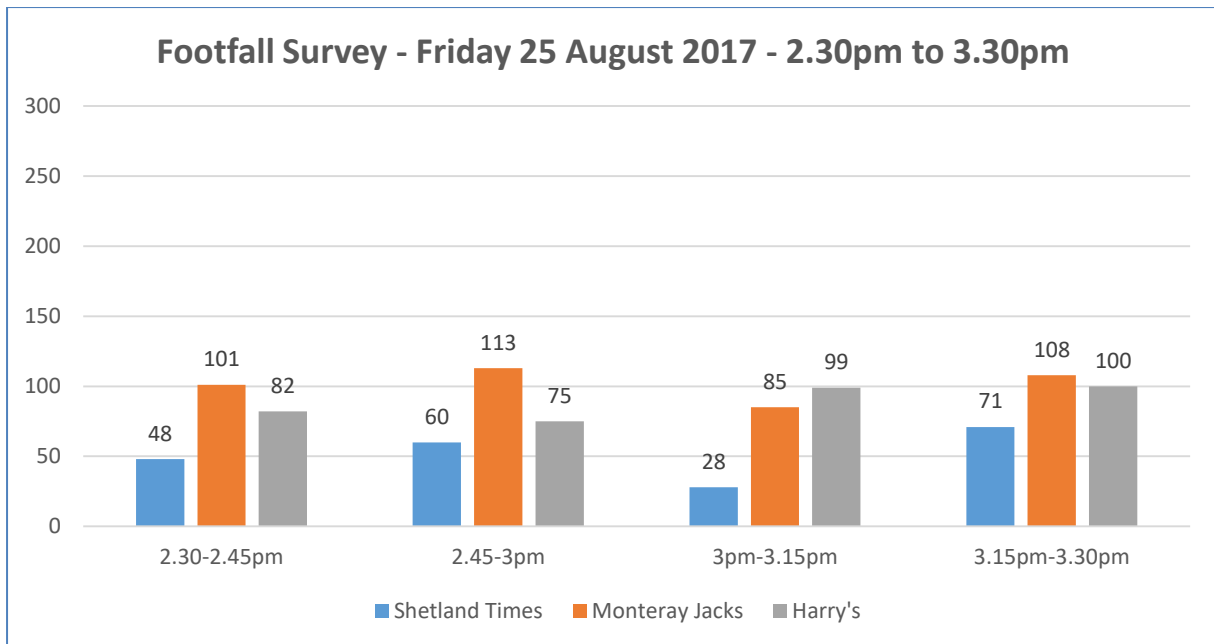
	25/08/17 12.30- 1.30pm	25/08/17 2.30pm to 3.30pm	06/10/17 12.30pm- 1.30pm	06/10/17 2.30pm to 3.30pm
North Commercial Street (Shetland Times)	567	207	315	234
Mid Commercial Street (Monterey Jacks)	713	407	536	370
South (Harry's)	667	356	407	365
Overall Pedestrians in 1hr Period	1947	872	1258	969

The findings shows a noticeable difference in footfall on the 2 days of the survey, in particular during the lunchtime survey (12.30pm to 1.30pm). Footfall at all three locations on 25 August was much higher (+689 in total) during this time than on 6 October. This can be attributed to schoolchildren from the old Anderson High School visiting the street at lunchtime, whilst the 6 October survey was carried on following the closure of the school, and within the October school-term holidays.

This demonstrates the impact that schoolchildren had on footfall and the vitality of street at particular times of day. Whilst they may have only contributed to certain types of retail expenditure (e.g food shopping, cafes and takeaways), they had an important role in making the street feel vibrant.

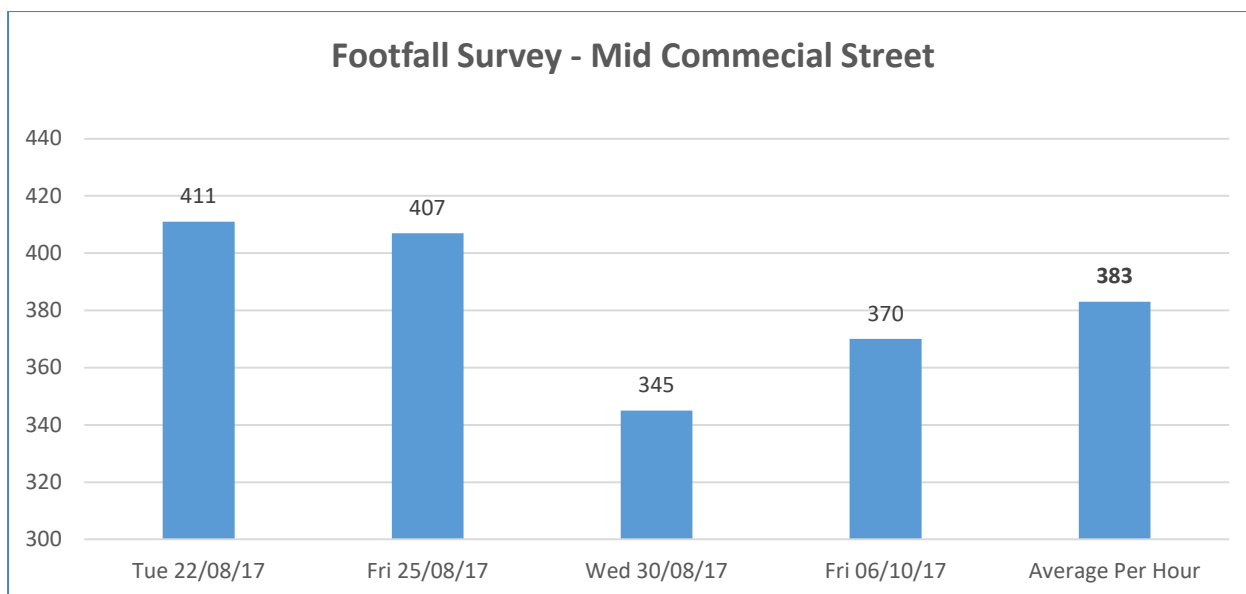


When both surveys are compared in the afternoon, it can be seen that footfall was very similar on the both days. It is noted that the afternoon survey of 6 October saw a slight increase in footfall at the south and north end of Commercial Street when compared to 25 August, although this was not of such a magnitude to attribute to a particular factor.



Additional pedestrian counts were undertaken at the mid-point of Commercial during 2.30pm to 3.30pm on other days of the week so that an hourly average footfall number could be established. It can be seen from the results below that footfall remained similar on the four days. There was a slight decrease in the afternoon of Wednesday 30 August, which is traditionally a day when shops close early. On 22 August there was a cruise line in the town, which may have resulted in a slightly higher footfall.

From the 4 surveys there was an average of 383 pedestrians passing the mid-point of Commercial Street per hour



Footfall Count – Mid Point of Commercial Street (based on 4 surveys during August and October)



**= Average of 383
pedestrians per hour**

26. Public Transport Infrastructure and Facilities = 3

Lerwick has a regular daytime (8-5pm) town centre service which runs every hour from Mondays to Saturdays between the north (Hoofields) and south (Quoys) of the town. Town centre bus stops are located at Harrison Square and the Esplanade. Bus shelters and timetable information is provided at the Esplanade but not at Harrison Square.

The Lerwick bus station is centrally located within the revised town centre boundary. It would benefit from some environmental and physical improvements, including better information on bus routes, timetabling and stances. The Bressay ferry terminal is located in the town centre and has covered waiting area.

Lerwick Bus Station



27. Accessibility of Town Centre = 3

Accessibility is an important factor in making a town centre attractive and viable. Town centres need to be accessible by all means of transport, although pedestrians should be the main priority to ensure the town centre is accessible to all members of the community.

Lerwick town centre generally provides good accessibility for pedestrians, cars, cycling and public transport. However, some car parks are in elevated positions and need to be accessed via the lanes or steep streets. Congestion is not an issue and parking is provided at a number of locations close to the town centre and within walking distance. The bus station and bus stops are also centrally located. Due to the contained nature of the town centre, shops and businesses are within convenient walking distance of parking and bus stops.

The Council has recently undertaken accessibility and safety improvements for pedestrians throughout the town centre. This has introduced a 20mph zone, traffic calming, zebra/pelican crossings and pavement widening. The traffic calming measures, in particular speed bumps, have received a mixed reception from the public and shop owners. In addition to this cycle parking facilities have been provided adjacent to Burns Walk on the esplanade, although these facilities are not clearly marked and lack shelter.

Commercial Street, from the Market Cross to Commercial Road (Fort Café & Takeway), and Irvine Place is a “No Traffic” zone between 11:30am and 5:30pm. However, despite the street being pedestrianised during these times a number of vehicles continue to access the street and park outside premises.

Seating along the Esplanade



28. Accessibility to Premises = 2

The Equality Act places a duty on service providers to take positive steps to ensure that disabled people can access services. The duty requires service providers to make reasonable adjustment and take action in relation to barriers that impede people with one or more kinds of disability prior to an individual disabled person seeking to use the service. For example, people living with dementia, mental health conditions or mobility impairments may face different types of barriers.

A walkover survey of the town centre was undertaken in September. It was noted that some premises (such as banks) have dedicated access for disabled people, whilst others have ramps available on request. However, the majority of shops appear to be inaccessible with door entrances being too narrow or too high. The lack of space in the town centre and narrow streets makes adaptations to buildings difficult.

29. Ease of Movement = 2

The 2010 Living Lerwick baseline survey of customers and business owners ranked 'Improvements to the pedestrian environment' as the most important area for the BID to improve, whilst 'traffic management' was 4th. Recent traffic calming measures will have improved pedestrian safety and ease of movement throughout the town centre, including road crossings and the introduction of the 20mph limit.

The main impact upon ease of movement for pedestrians in the town centre is the presence of cars. Our traffic survey demonstrates that vehicle owners are continuing to access parts of the street despite it being a no traffic zone. Due to the street being narrow, there is also some conflict between pedestrians and vehicles with pedestrians often have to move out of the way to let them pass. Cars also park in

disabled places and unmarked places outside shops along the street, predominantly outside the Royal Bank of Scotland, the Market Cross, and Bank of Scotland.

Due to the amount of people using vehicles to access the street, careful consideration would have to be given to making further restrictions as this could impact negatively on trade for shops and services in the town centre.

The area around the Market Cross is generally busy with vehicles



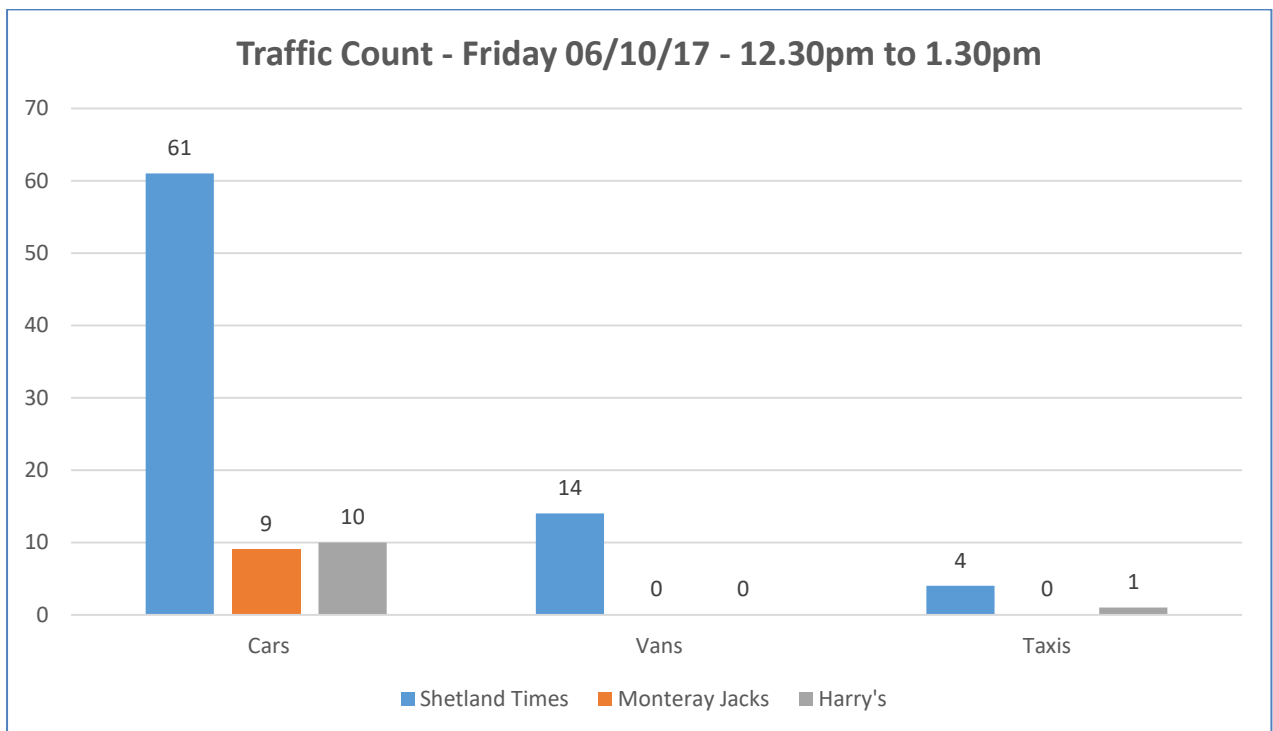
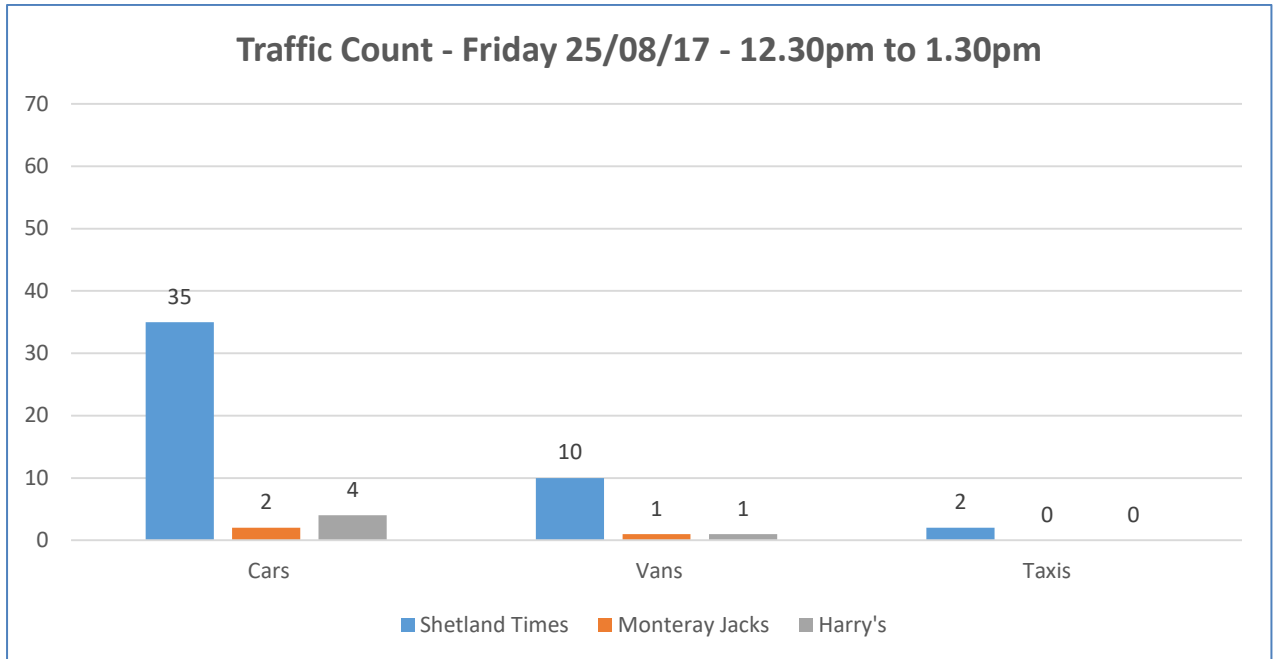
Traffic counts were undertaken at the same time and locations as the pedestrian footfall surveys on the 25 August 2017 and 6 October 2017. The survey found that the south end of Commercial Street is well used with an average of 55 cars and 11 vans (excluding delivery vehicles) per hour.

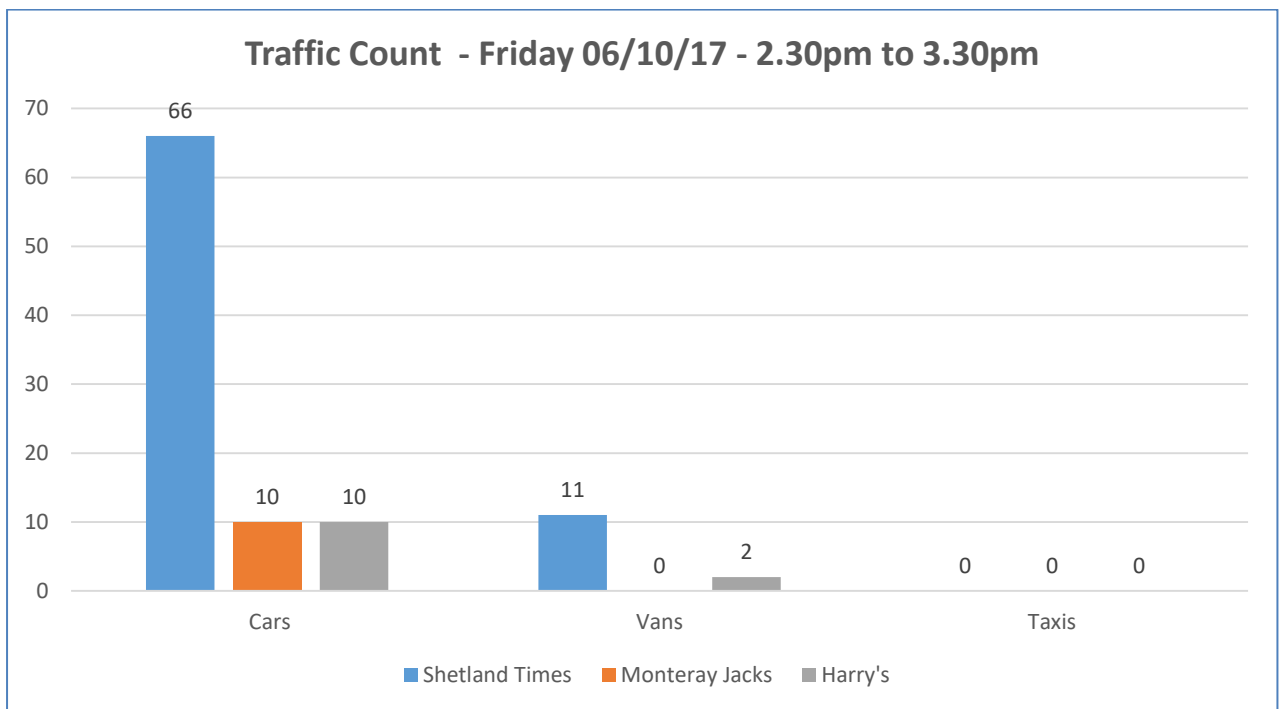
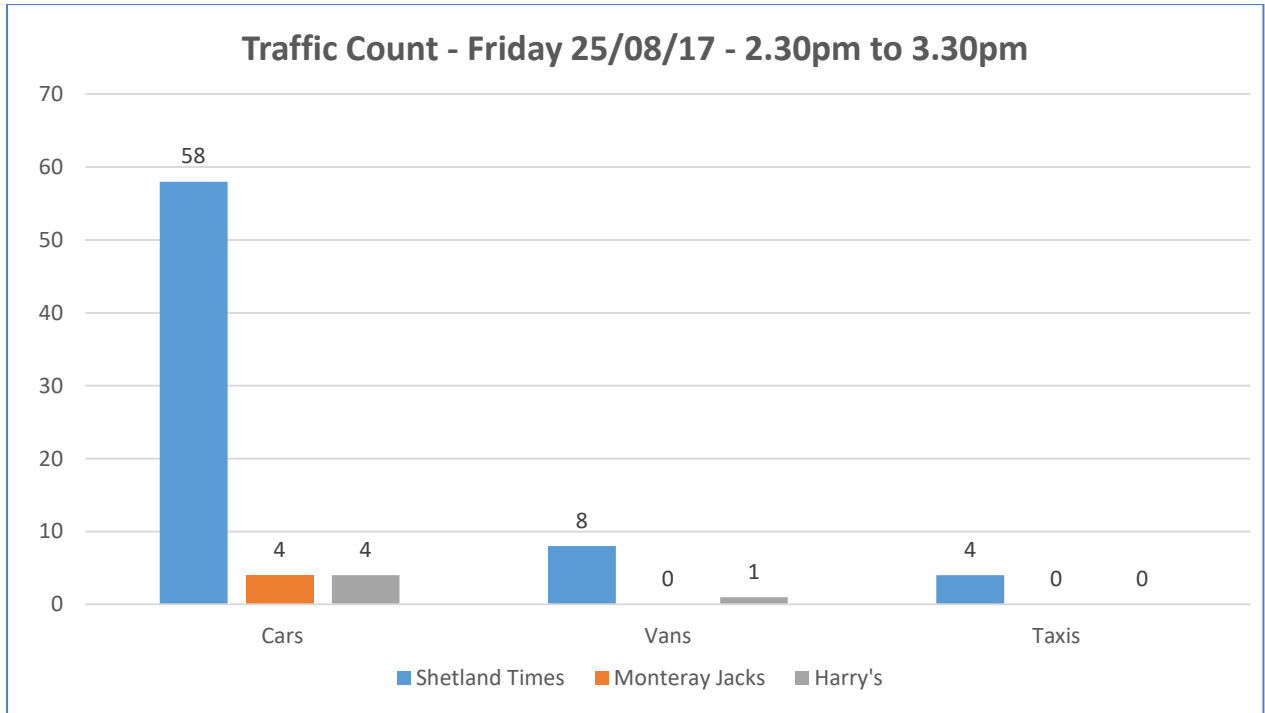
**Average Vehicle Use - South End of Commercial Street
(Shetland Times to Market Cross)**

 = 55 cars per hour

 = 11 vans per hour

The mid-point and north end of Commercial Street also experienced some road traffic during these times, despite the Market Cross to Commercial Road and Irvine Place being a “No Traffic” zone between 11:30am and 5:30pm. There was an average of 11 cars per hour.





30. Parking on Offer = 4

Data collected from Living Lerwick has shown there are 744 parking spaces and 39 disabled spaces available in the BID area. www.livinglerwick.co.uk/town-centre

The highest number of spaces is provided at the Hillead car park (154) and the majority of others are within close walking distance of the town centre. The largest parking area adjacent to the main core of Commercial Street is located at Victoria

Pier. However, this is the only car park which charges and this may deter some users and encourage them to park inappropriately along the street instead. It would be helpful if further car parking studies were undertaken to provide an indication of existing conditions, issues and opinions of the general public.

Cycle parking facilities have recently been introduced at a convenient location in the town centre adjacent to Burns Walk. To encourage more people to cycle, the town centre would benefit from the provision of additional secure and sheltered cycling parking, including bike shelters near commercial premises and the bus station.

Parking Spaces in Lerwick Town Centre BID Area

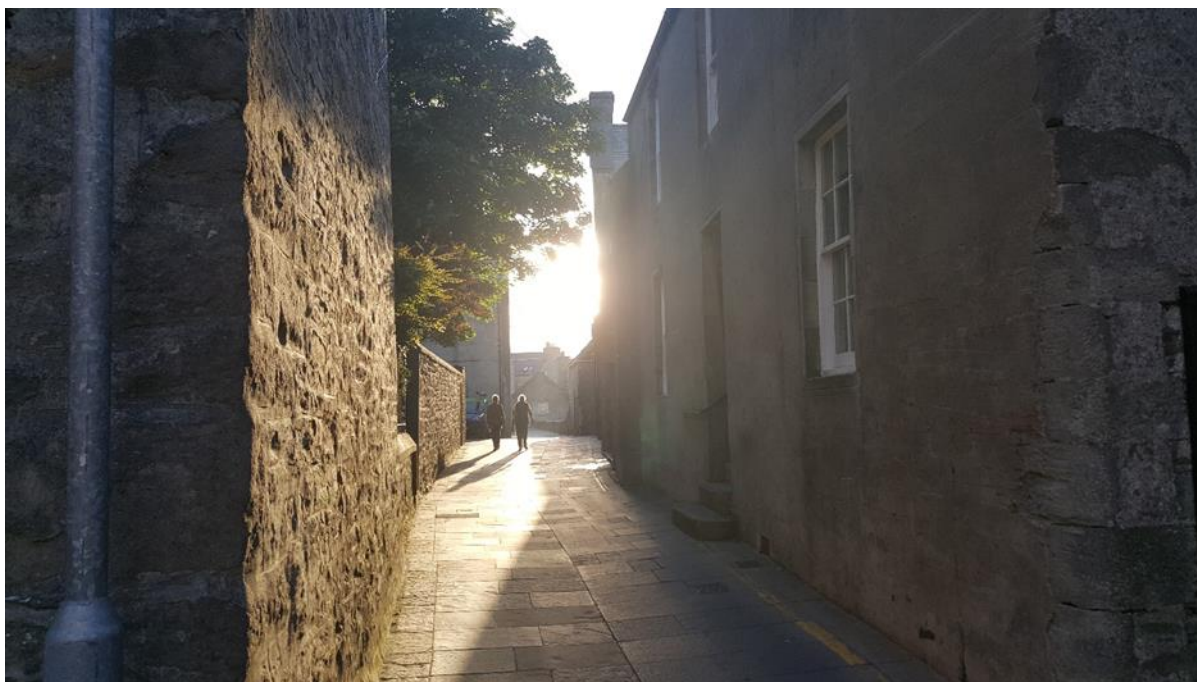
Area	Spaces	Disabled
Harbour Street	15	1
Hillhead	44	0
Lower Hillhead	29	2
Market Street	5	1
Commercial St & Irvine Place	7	5
Hillhead (Annsbrae)	3	0
Charlotte Street	2	0
Queens Place	16	2
Rechabite Place	6	0
Commercial Road	4	1
Esplanade	41	3
Victoria Pier	68	3
Fort Road	51	2
Market Street	59	4
Hill Lane/Hillhead Car Park	150	4
Church Road (North)	17	1
Town Hall & Lystina House	12	0
Hill Lane	8	0
Lerwick Waterfront Area	124	0
Queens Place	9	0
Commercial Road (below Fort)	37	4
Church Road (South)	20	4
King Erik Street	17	2
Total	744	39

31. Safety and security = 3

A CCTV system was installed in the town centre in 2010 to improve personal safety. The effectiveness of the system is currently under review. As of November 2017 a business plan was being prepared for a replacement system.

During the day time the town centre is generally busy, and its contained nature means that most parts are overlooked therefore deterring crime. At night parts of the town centre are quiet and poorly lit, including areas of the Lerwick lanes. New lighting and improved CCTV would help improve perceptions of safety and security.

Lerwick town centre falls within the [Lerwick North Multi Member Ward](#) of Police Scotland. The top 3 public priorities in the most recent report (2015) are drug dealing/misuse, violent crime and antisocial behaviour.



Community

32. Attitudes, Perceptions and Aspirations = 3

The Living Lerwick customer survey that was undertaken in 2010 questioned over 200 members of the public on their views on what were the negative impacts on visits to Lerwick Town Centre. The top six areas were as follows.

1. Use of internet/mail order shopping – raised by 69% of respondents.
2. Availability of other shopping areas in Lerwick - 39% of respondents.
3. Variety and availability of goods and services - 36% of respondents.
4. Customer service – 34% of respondents.
5. Parking - 30% of respondents.
6. Opening hours - 28% of respondents.

Given that the survey is now over 7 years old, it would be beneficial if Living Lerwick were to commission a follow up survey to gain the current views and opinions of the public.

The **Shetland Place Standard** survey for Lerwick and Bressay residents, which took place in 2016, ranked the indicator ‘Street and Spaces’ at 4.4 out of 7, meaning that there was some room for improvement. Overall it ranked 11th out of 12 priorities. In total 230 people responded and 101 people provided comments to the Place Standard survey. Key points raised in relation to Lerwick town centre and the surrounding area were as followings:

- Mixed feeling of attractiveness – some consider the town as an attractive area, whereas others consider it to be grey and lacking in colour.
- Good landmarks and buildings seen in a positive light, with flower park, play parks, Knab area appreciated as open public spaces.
- Some negative comments regarding the modern buildings.
- Negative comments made regarding the town centre with the need to develop and enhance the area to be a welcoming space for tourists and locals including more seating.
- Importance of green space with a desire for more trees and greenery to be planted.
- Planning of new developments should include green open spaces.
- Some neglected, derelict buildings and safety issues raised.
- Planning inconsistencies.
- Better signposting places of interest and the coastal path would be an improvement.

‘Traffic and parking’ scored lower with 3.9 out of 7 meaning that improvements were needed. 233 people responded and 118 gave comments. Key points raised in relation to traffic and parking which apply to the town centre included:

- Mixed comments about the level of parking – some consider there to be enough and others consider the amount of parking as limited.
- Inconsiderate parking, people using pavements and there being a lack of control.
- New developments of flats with the perception that there is not enough parking close by.
- Few disabled parking spaces
- Appreciation that there is free parking available.
- Some consider parking and access arrangements on Commercial Street to be poor with a call to have it pedestrianised.
- No parking available on the pier when cruise ships are visiting.
- Mix of views regarding traffic calming - some call for traffic calming measures speed bumps while some consider speed bumps not to be effective and potentially damage cars.
- Traffic lights not working is an issue.
- Cars taking priority over pedestrians.
- Poor attitude of drivers.

‘Connectivity/Public Transport scored 3.8 out of 7 and was the third highest priority area to improve. 238 people responded and 136 provided comments. Key points raised in relation to connectivity and public transport which apply to the town centre included:

Public Transport	Moving Around
<ul style="list-style-type: none"> • Bus service in town is not frequent enough 	<ul style="list-style-type: none"> • Unsafe cycling due to narrow roads and speed limits

<ul style="list-style-type: none"> • Timetabling difficult to understand • Late night bus service unsatisfactory • Bus stops not in optimal locations • Need to increase use in Lerwick • Better information needed 	<ul style="list-style-type: none"> • Need for safe dedicated cycleways • Better drop kerbs and low mobility enhancements needed • Better maintenance of pathways required
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Health Check - Conclusion

Lerwick town centre has scored reasonably well for its first health check with an overall score of 2.9 out of 5. Physical environment, activity and community scored the highest of all the indicators whilst property scored the lowest.

Indicator	Score
Retail & Professional Services	2.9/5
Activity	3/5
Physical Environment	3/5
Property	2.5/5
Accessibility	2.7/5
Community	3/5
Overall	2.9/5

There were specific areas where the town centre scored particularly high, including the presence of cultural and community facilities, the high quality historic environment, parking on offer, presence of professional services and the lack of betting/money lending shops.

There are, however, areas of concern that will need to be addressed in the future if the town centre is to remain an attractive place for businesses to locate and people to visit. This includes the high vacancy rate for shops which is well above the Scottish average and the fact that a number of properties have remained vacant for some time. Additionally, there were issues identified around rental values, access and ease of movement through the town centre and the lack of public spaces.

Our pedestrian footfall and traffic survey revealed a higher than anticipated number of pedestrians and vehicles accessing the street. It was found that on average 383 pedestrians an hour were crossing the mid-point of Commercial Street and 66 vehicles were accessing the street from the south end.

The closure of the former Anderson High at the Knab in October has resulted in a significant reduction of pedestrian footfall in the town centre at particular times of day. It will also impact negatively on the vibrancy of the street and on convenience stores in particular. It is therefore important that consideration is given to how new

development that is proposed as part of the Knab masterplan helps to contribute to increasing footfall in the town centre.

Next Steps

The findings of this health check will be used to inform our next Local Development Plan, in particular the Monitoring Report and the Main Issues Report, which are due to be published later in 2018.

We shall also work closely with Living Lerwick and Community Planning Partners so that the findings of the health check can be used by them to develop their strategies. The findings should also be used as an evidence base to identify town centre improvements and support funding applications.

Appendix A provides analysis of Strengths, Weaknesses, Opportunities and Threats (SWOT) to help inform future work.

APPENDIX A - Lerwick Town Centre SWOT Analysis

<p>Strengths</p> <p>High quality historic environment and setting Compact and accessible town centre Parking spaces close to the town centre Good variety of comparison shops High number of professional and technical services</p>	<p>Weaknesses</p> <p>Lack of space to develop further Lack of food shops/convenience stores Lack of sites to develop and improve Narrow main streets Condition of some buildings Layout of some buildings constrain improvements</p>
<p>Opportunities</p> <p>BID, Living Lerwick and funding applications Encouraging more flats above shops/business Environmental improvements to town centre and buildings Repairs to buildings, public realm Better marketing of vacant properties and sites Increasing food shopping in the town centre Knab Masterplan Fort Charlotte Fish market site British Telecom site Linking events with the town centre and Mareel Cruise ship visitors – increasing trade and facilities</p>	<p>Threats</p> <p>Impact of internet/mail order shopping Impact of supermarkets Impact of Anderson High School moving More shops/businesses closing Shops and businesses remaining vacant Condition of buildings worsening Impacts of traffic calming on town centre attractiveness Increased rents and business rates Decreased footfall</p>

APPENDIX B – Pedestrian Footfall Survey Locations

This was the first footfall survey that has been undertaken in Lerwick town centre for town centre health check purposes. The findings can be used as a baseline and comparison for future surveys. Footfall was collected at different times of day and on different days of the week at 3 preselected locations along Commercial Street:

1. South End of Commercial Street (counting point taken between the Royal Bank and the Post Office building to include pedestrians entering from Church Lane)
2. Mid-Point of Commercial Street (counting point taken between properties at 88 and 147 Commercial Street)
3. North End of Commercial Street (counting point between properties at 177 and 122 Commercial Street and included pedestrians entering from Charlotte Street).

Footfall was measured by counting the number of pedestrians who passed across the counting point in both directions. All pedestrians were counted with the exception of young children and babies.

