

# CONTENTS

<b>INTRODUCTION</b> .....	<b>1</b>
<b>PART 1: PRESSURE (DEMAND AND SUPPLY)</b> .....	<b>4</b>
<b>1 BUSINESS</b> .....	<b>4</b>
<b>1.1 Financial and business services</b> .....	<b>4</b>
1.1.1 New office accommodation .....	5
1.1.2 Need to replace older office stock .....	5
1.1.3 Clustering .....	5
1.1.4 Design quality, space standards and user satisfaction.....	6
<b>1.2 Retail</b> .....	<b>7</b>
1.2.1 The on-island retail offer and consumer choice.....	8
1.2.2 Clone Town or Home Town?.....	9
1.2.3 The evening economy .....	9
1.2.4 Accessing the retail areas (See also Part 2 section 4.5: accessibility) .....	10
<b>1.3 Industry</b> .....	<b>11</b>
1.3.1 Availability of appropriate land & accommodation .....	12
1.3.2 Responding to a changing technologies and global influences.....	12
<b>1.4 Primary sector</b> .....	<b>14</b>
1.4.1 Farming.....	15
1.4.2 Horticulture.....	16
1.4.3 Fishing (see also Part 2 section 4.3.3: harbours) .....	16
1.4.4 Minerals extraction .....	17
<b>1.5 Visitor economy</b> .....	<b>18</b>
1.5.1 Guernsey as a visitor destination .....	19
<b>2 COMMUNITY &amp; SOCIAL</b> .....	<b>20</b>
<b>2.1 Housing</b> .....	<b>20</b>
2.1.1 Housing land availability.....	22
2.1.2 A range of homes to match housing needs .....	22
2.1.3 Sustainability & design.....	23
2.1.4 Lifetime homes.....	23
<b>2.2 Crime &amp; disorder</b> .....	<b>25</b>
2.2.1 Localised patterns of crime and disorder .....	26
<b>2.3 Community involvement</b> .....	<b>27</b>
2.3.1 Engaging with the public in policy development.....	28
<b>2.4 Sports, leisure and the arts</b> .....	<b>29</b>
2.4.1 Sports facilities.....	30
2.4.2 Informal participation .....	30
2.4.3 Urban open spaces .....	30
2.4.4 Public art.....	31

<b>2.5</b>	<b><i>Health and social care</i></b> .....	<b>32</b>
2.5.1	Health and mobility impacts .....	33
2.5.2	Young people and families (see also: 1.2.3 the evening economy; 2.3 community involvement; 2.4.2 informal participation).....	33
<b>2.6</b>	<b><i>Education</i></b> .....	<b>35</b>
2.6.1	Design and use of education sites .....	37
<b>PART 2: RESOURCES (OPPORTUNITIES AND CONSTRAINTS) .....</b>		<b>38</b>
<b>3</b>	<b>POPULATION</b> .....	<b>38</b>
<b>3.1</b>	<b><i>Demographic change</i></b> .....	<b>38</b>
3.1.1	Actual or perceived overcrowding and congestion .....	39
3.1.2	Working population .....	39
3.1.3	Ageing population .....	39
<b>4</b>	<b>FUNCTIONAL</b> .....	<b>41</b>
<b>4.1</b>	<b><i>Energy</i></b> .....	<b>41</b>
4.1.1	Energy efficiency (see also: 5.5.2 Quality of new buildings).....	42
4.1.2	Traffic and transport (see also section 4.5: accessibility; and section 5.2.1: air quality).....	42
4.1.3	Renewable energy sources.....	42
<b>4.2</b>	<b><i>Water</i></b> .....	<b>44</b>
4.2.1	Water catchment .....	45
4.2.2	Water consumption and conservation .....	45
<b>4.3</b>	<b><i>Communications</i></b> .....	<b>46</b>
4.3.1	Telecommunications .....	47
4.3.2	Airport .....	47
4.3.3	Harbours .....	48
<b>4.4</b>	<b><i>Waste management</i></b> .....	<b>50</b>
4.4.1	Solid waste .....	51
4.4.2	Waste water.....	51
<b>4.5</b>	<b><i>Accessibility</i></b> .....	<b>53</b>
4.5.1	Personal mobility (see also section 4.1.2: traffic and transport) .....	54
4.5.2	Public transport .....	54
4.5.3	Highway network .....	55
4.5.4	Car parking.....	57
<b>5</b>	<b>ENVIRONMENTAL</b> .....	<b>58</b>
<b>5.1</b>	<b><i>Climate change</i></b> .....	<b>58</b>
5.1.1	Adapting to a changing climate.....	59
<b>5.2</b>	<b><i>Air and water quality</i></b> .....	<b>60</b>
5.2.1	Air quality (see also section 4.1.2: traffic and transport).....	61
5.2.2	Freshwater quality (see also section 4.2: water; and section 5.1: climate change) .....	61
5.2.3	Sea water quality .....	61

<b>5.3</b>	<b><i>Land and accommodation</i></b> .....	<b>63</b>
5.3.1	Optimum use of land and accommodation .....	64
5.3.2	Distribution of development .....	65
5.3.3	States owned land.....	65
5.3.4	Under-used and vacant accommodation.....	66
<b>5.4</b>	<b><i>Habitats and landscapes</i></b> .....	<b>68</b>
5.4.1	Habitats .....	69
5.4.2	Landscapes .....	69
<b>5.5</b>	<b><i>Design and the built environment</i></b> .....	<b>70</b>
5.5.1	Cultural heritage .....	71
5.5.2	Quality of new buildings .....	71
5.5.3	Quality of the public realm.....	72
<b>6</b>	<b>FINANCIAL</b> .....	<b>73</b>
<b>6.1</b>	<b><i>Taxation and capital expenditure</i></b> .....	<b>73</b>
6.1.1	Linking public and private sector investment decisions.....	74