

# LERWICK TOWN CENTRE HEALTH CHECK 2025



September 2025



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# 1. Background and Introduction

The Lerwick town centre health check was first undertaken by the Council's planning service during the months of July to October 2017. This was the first health check – or audit - that had been undertaken for Lerwick and was used to inform the current Local Development Plan (LDP) 2014 for decisions on planning applications and was to be used to inform the policies contained within the emerging LDP2.

Whilst no specific date was set for a refresh and update of the Health Check, it was agreed that it should be done as and when necessary. The town centre is never static in terms of its every-day activities, and is an ever-changing place for retail trade, business, and residential activities. Therefore, it was vital that the Town Centre Health Check was refreshed, in order to update the information contained within it and for that information to be relevant and robust, going into the development of our next Local Development Plan 2 (LDP2) or Proposed Plan.

This update to the Town Centre Health Check – published in 2018 - was undertaken during the months of January to July 2025, and will again be used to inform town centre based policies contained within the new Local Development Plan 2.

The Council's planning service, in particular the Development Plans Team, worked closely with stakeholders to monitor town centre performance and activities in order to produce this Town Centre Health Check update and refresh.

## What is the Purpose of a Town Centre Health Check?

The new National Planning Framework 4 (NPF4) requires that local authorities work alongside partners, including local communities, businesses, and community groups as appropriate, in order to develop town centre audits – also known as health checks.

The purpose of a health check is to assess a town centre's strengths, vitality and viability, weaknesses and resilience. The results should then be used to develop town centre strategies to help identify development opportunities, including gap sites, brownfield land, re-use of empty properties (and redundant or vacant upper floors), and buildings at risk.

The spatial or physical elements of town centre strategies will be included in the Proposed Development Plan and will help inform LDP policy. There is a vital role for LDPs to help reimagine our town centres and help them respond to on-going challenges and opportunities. The LDP can help support town centres socially and economically and can also help them address and meet their climate change responsibilities.

Town centres that provide a diverse range of shops and services can attract investment, increase footfall, and contribute to a sense of wellbeing and local identity. It is therefore important that Lerwick town centre remains an attractive and viable place for the residents of Shetland and visitors. As there is now 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.

## **Town Centre Challenges**

Across Scotland, town centres have faced similar challenges in terms of economic decline, retail competition, vacant properties, or infrastructure issues.

Since the first health check was conducted, the world faced a pandemic that brought further threats to the viability and health of our town centres. The COVID-19 pandemic created major challenges for small town centres across Scotland, with reduced footfall emerging as one of the most significant issues. Restrictions and the rapid shift to home-working meant that many former commuters no longer visited town centres regularly, leading to a decline in passing trade and contributing to rising vacancy rates on high streets. At the same time, long-standing structural pressures - such as the growth of online retail and changing consumer habits - were intensified by lockdowns, further weakening the resilience of smaller retail areas.

Small Scottish town centres continue to face a myriad of challenges that threaten their vibrancy and sustainability. One major issue is the decline of local economies, exacerbated by the rise of online shopping and larger retail chains, which draw customers away from local businesses. Additionally, these towns often struggle with aging populations and a lack of affordable housing, making it difficult to attract and retain younger residents. Public services and infrastructure can be limited, further hindering growth and development.

Moreover, small towns must navigate the complexities of maintaining cultural heritage while adapting to modern needs, which requires innovative solutions and strong community leadership. Despite these challenges, many towns are finding ways to revitalise their centres through community-led initiatives and strategic planning.

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

To undertake the health check, the indicators set out in NPF4 were used and adapted to assess the vitality and viability of the town centre. The principles of local living and 20-minute neighbourhoods will also help provide context. 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. The 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 as previously stated, will be used as part of the evidence base going into the policy development in the next LDP2 and any subsequent strategies by Council services, Living Lerwick's Business Improvement District, and the Community Council. The information may also be used to help inform any Local Place Plan for Lerwick. 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.

## **National Policy and the National Planning Framework 4 – Key Town Centre Information**

In 2023, Scottish Ministers adopted Scotland's new National Planning Framework 4 (NPF4). It introduced and set in policy, a raft of new objectives, standards, and goals for the future development and expansion of our communities, and the protection and enhancement of our natural environment. The NPF4 is now part of the statutory Development Plan for Scotland.

NPF4 has set out new and updated town centre and retail policies, to help ensure continued support that builds on the successes of our town centres. It also sets out measures to help support town centres by encourage, promoting, and facilitating development. NPF4 policy recognises that town centres are national assets and will apply measures that will help town centres adapt positively to long-term economic, environmental, and societal changes.

National and local planning policy will continue to support development proposals, that enhance and improve the vitality and viability of Lerwick's town centre. Shetland Local Development Plan 2 will also introduce new and refreshed retail and town centre policies, that will also include the town centre first principle for all local planning policy decision-making that may affect Lerwick town centre.

### **Town Centre First Principle**

In November 2013 by the Scottish Government in its town Centre Action Plan: Scottish Government Response and in association with COSLA it set out the principles that were to become the town centre first approach.

The town centre first principle asks that government, local authorities, the wider public sector, businesses and communities put the health of town centres at the heart of decision making. It seeks to deliver the best local outcomes, align policies and target available resources to prioritise town centre sites, encouraging vibrancy, equality and diversity.

In making the agreement, the Scottish Government and COSLA committed to a collaborative approach, which understands and underpins the long-term plan for Scotland's town centres.

The principle is not a duty, and it is not prescriptive, however, it will take local needs and circumstances into account, it is about:

- adopting an approach to decisions that considers the vibrancy of Lerwick town centre as a starting point
- ensuring that the health of our town centre features in decision-making processes
- open, measured and transparent decision-making that takes account of medium to longer-term impacts on our town centre
- recognising that town centre locations are not always suitable and making sure that the reasons for locating elsewhere are transparent and backed by evidence

Local authorities and wider public bodies have embraced the principle since its inception and are driving positive change by prioritising town centres in public investment decisions.

## Town Centre Living

Town Centre Living (TCL) is a key policy aspiration for the Scottish Government, local authorities and a wide range of other public, private and third sector bodies. It builds upon strong foundations of strategic place planning and supports key principles around inclusion, wellbeing and sustainability.

It is aimed at revitalising town centres by encouraging more people to live in them, in order to create 24-hour town centres that remain active and vibrant after closing hours. This has been an aspiration and planning policy aim for many years, and will remain so, in order to help facilitate suitable new development and conversions of old or existing buildings or units into residential property.

Key benefits of Town Centre Living include:

- **Active places:** Encouraging active travel and walkable neighbourhoods.
- **Economic resilience:** Supporting local businesses and services.
- **Environmental sustainability:** Promoting net-zero goals and reusing existing built assets

The development of housing that attracts more people to live within town centres can have a major role in creating strong and sustainable places, as well as supporting key policy aims around active travel, affordable and independent living, walkable neighbourhoods, the wellbeing economy, net zero, and the re-use of existing built assets.

TCL can underpin the resilience of many of Scotland's places, but it needs to be done in a way that delivers the right homes, in the right places, for the right reasons. There has, however, been limited TCL activity across Scotland and some towns where there has been little, or even no, new town centre housing development for a very long time.

## National Planning Framework 4. Policy 15: Local Living and 20-Minute Neighbourhoods

The National Planning Framework 4 recognises that we face complex challenges – from the climate and nature crisis, to poverty, disadvantage, and stark health inequalities. Those challenges face a joined-up and collaborative approach to deliver positive outcomes for people and the environment.

NPF4 supports the delivery of liveable places – or local living - where we can live better, healthier lives.

### 20-minute neighbourhoods

The 20-minute neighbourhood concept or principle is one of the many ways to support local living. The concept aims to provide access to the majority of daily needs within a 20-minute walk, wheel, or cycle from home.

It is an approach likely to be more readily achievable in urban places such as towns or villages like Lerwick and Scalloway. It is designed to be applied flexibly, in response to local circumstances. So, development or regeneration that supports this concept in Lerwick town centre, should be encouraged and supported.

### Local living

Local living provides people with the opportunity to meet the majority of their daily needs within a reasonable distance of their home. It is centred on supporting people to 'live well locally'. Local Living or living well locally concept, is more applicable to rural areas of Shetland, however, the principle should be kept in mind when new developments are proposed for the town centre area.

### The Place Principle

The Place Principle is a framework adopted by the Scottish Government and COSLA to promote a collaborative, place-based approach to community development. It emphasises the importance of working together across sectors and with local communities to improve the lives of people, support inclusive and sustainable economic growth, and create more successful places. It is a principle that should be adopted for all new developments or any regeneration of our town centre.

Key aspects of the Place Principle include:

**Collaboration:** Encourages joint planning and decision-making among all those responsible for providing services and managing assets in a place

**Community Involvement:** Promotes active participation from local communities in shaping their environment and services

**Integrated Approach:** Focuses on combining resources, services, and assets to achieve better outcomes for people and communities. This principle aims to create a

shared vision for places, ensuring that resources are used effectively to meet the needs and realise the potential of communities

## 2. Lerwick Town Centre Boundary

National Planning Framework 4 requires that development plans identify town centres that display:

- a diverse mix of uses including shopping;
- a high level of accessibility;
- qualities of character and identify 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

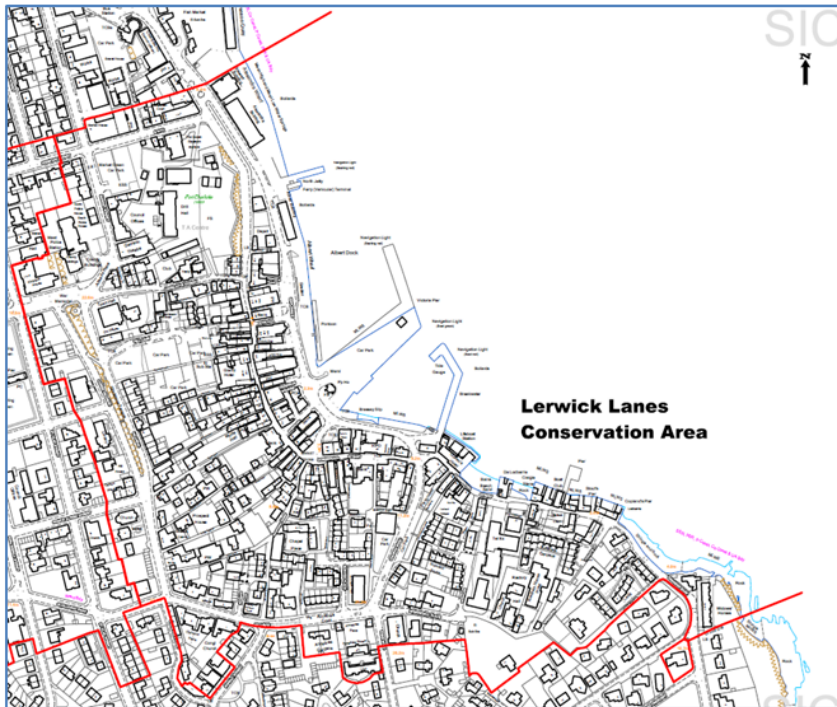
In previous Local Development Plans the Lerwick town centre boundary has been defined by the Lerwick Lanes Conservation Area. For the purposes of this update, we have followed the same boundaries as set out in the initial 2018. These boundaries were extended to the north to incorporate a mix of additional uses.

The health check update once again 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.

The extended boundary first proposed in the 2018 health check, again complies with the definition of a town centre, and it displays the aforementioned town centre qualities referred to in national planning policy. The extended boundaries are 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.

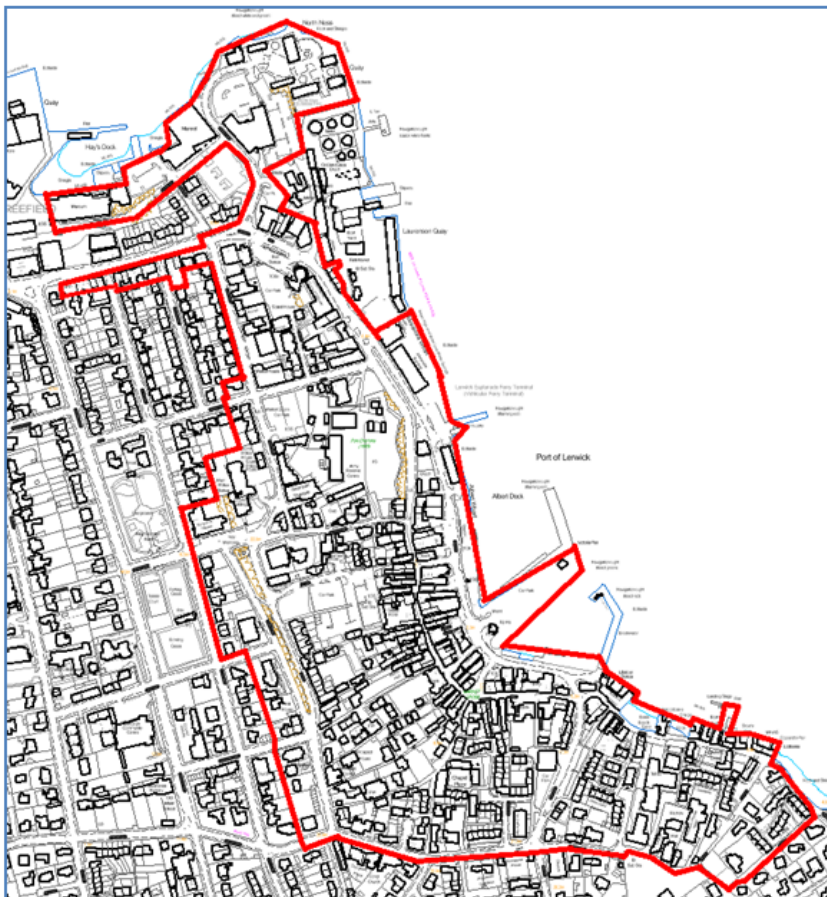
Land currently used for industrial and port related activities (oil distribution depot, the Malakoff and the former fish market) has once again not been included within this health check. The finalised town centre boundary will be considered further and be subject to public consultation through the LDP2 process.

### Current town centre boundary



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### 2025 Health Check Boundary



### 3. Town Centre Population then and now

The extended boundary was used to estimate the population of the town centre for the 2018 health check using population data Output Areas (OA) from the 2011 census data. The following update to the town centre population statistics, has been taken from 2022 output area data taken again from Scotland's census information.

Scottish Census Output Areas are the smallest geographical units used for reporting census data in Scotland. Each output area typically consists of around 50 households.

Please note that the following data will not give a 'to-the-person' indication due to data protection. It should also be noted that the 2022 data zone boundary areas have since been amended, and do not correlate with the exact data boundaries used in the 2011 data zones. Therefore, for the purposes of this refreshed health check, the new data zone areas have been best matched to the town centre boundary map and give an approximation of population statistics and are a snapshot of the town centre in 2022.

#### Census Output Area Code - Approximate Location

S00174782 - Museum & Archives, North Ness

S00174783 - Commercial Road, North Ness Business Park

S00174785 - Commercial Street, Hill Lane, Esplanade, Harbour Street

S00174797 - St Olaf Street, Lower Hillhead

S00174799 - Queen's Place, Church Road, Market Cross, Commercial Street

S00174802 - Hillhead, Hangcliff Lane, Bank Lane, Reform Lane

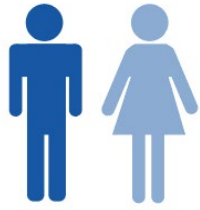
S00174805 - Commercial Street, Queens, Kveldsro, Stout's Court, Leog Lane

S00174806 - Annsbrae Court, Rechabite Place, Hillhead

The approximate population total in 2022 of the town centre boundary area was **850**, of which there were **443** males and **407** females.

Lerwick's overall population in the 2011 census was 6928. Lerwick's overall population in the 2022 census was 6,760.

(Source: [2022 output area data | Scotland's Census](#))



**850**  
**Total Population**



**443**  
**Males**



**407**  
**Females**

#### Summary of Key Findings from 2022 Census Data

- The highest proportion of the population in the town centre still remain between the ages of 20 and 34, with the lowest number in the 16 to 24 age group.
- The youngest of the town centre's population (between 0-15) is 102 and the oldest (over 65) is 149
- Economically active population – excluding students (15-65) is 560
- The number of households within the town centre boundary area are approximately 506
- The town centre has a high population density with the largest proportion of households still within the flat or maisonette category. The main household types and density can be summarised as follows:
  - flats, maisonette or apartment – 253
  - whole house or bungalow: detached – 77
  - whole house or bungalow: semi-detached - 95
  - whole house or bungalow including terraced housing - 80
- The largest number of households within the town centre area are still occupied by a single person - 286, with two person households at 162, three persons at 44 and four persons at 21.

## 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). A BID is part of a town, tourism and visitor area, commercial district, or specific theme (such as food and drink), in which businesses work together to invest in local improvements. The BIDs model is designed to help local businesses to improve their communities. The legal framework for BIDs is covered by part 9 of the Planning etc (Scotland) Act 2006 and other secondary legislation.

All properties in the defined BID area are automatically members of Living Lerwick following a democratic vote of all members on forming or continuing a BID area. On 20<sup>th</sup> August 2021, member businesses voted with a 73% majority to continue with a BID in Lerwick town centre for another five years. This is the third BID term, and another vote will be due in August 2026.

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.

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Based on surveys of businesses in the BID area during the development of the updated Business Plan, 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 business 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 with issues facing business and encourage inter-business working.

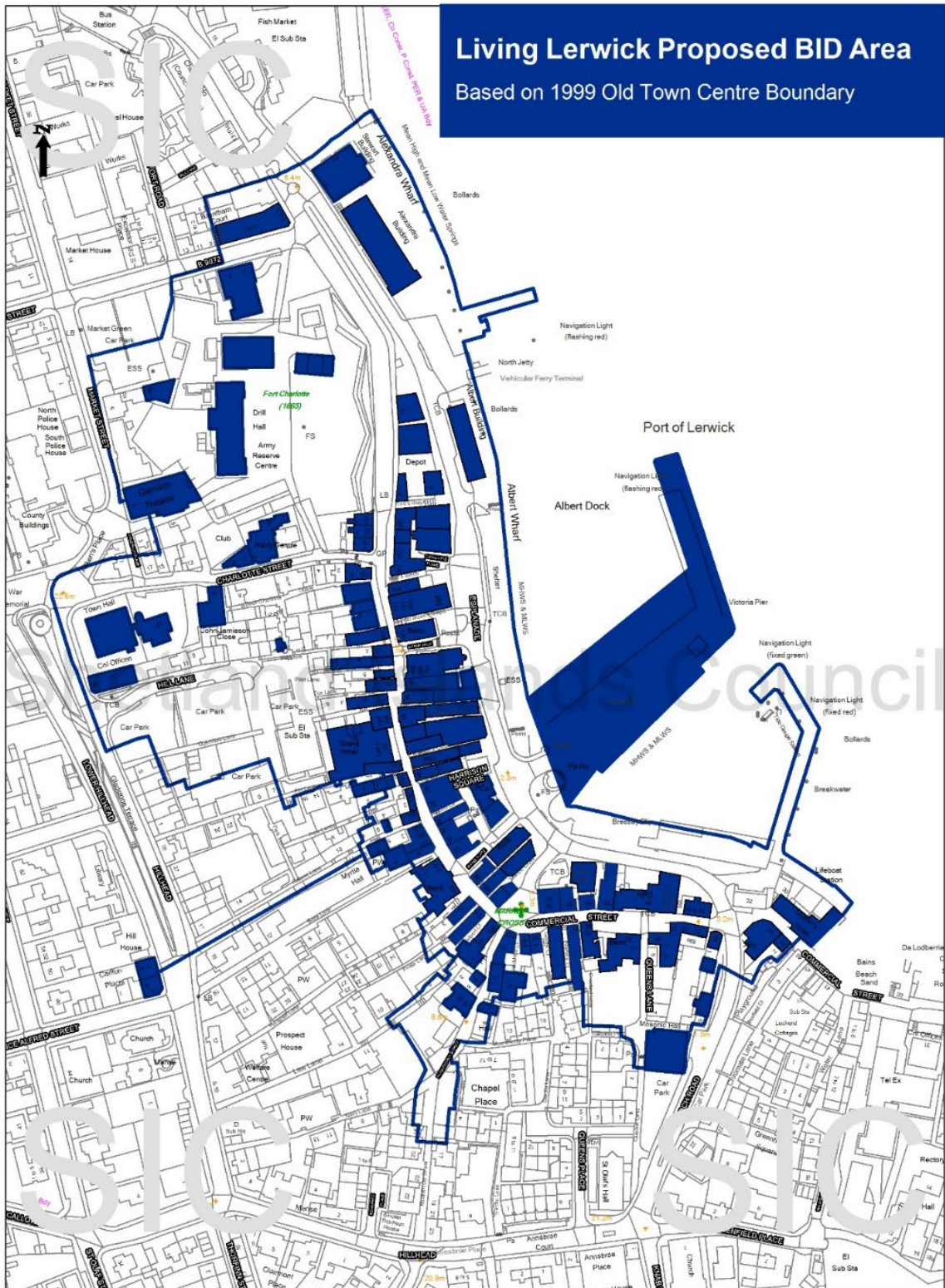
As of August 2024, there are 153 non-domestic properties in the BID area which qualify as members of Living Lerwick and generate £74,000 of levy payments each year. More information on BID projects, BID surveys, how the BID is run and its future objectives can be found on the Living Lerwick website at: [www.livinglerwick.co.uk/](http://www.livinglerwick.co.uk/)

Since publication of the 2018 Health Check, Lerwick has seen various footfall activities promoted by businesses in the town centre. Events such as the Tall Ships in 2023 drew huge crowds to the streets and marked the biggest event the town had seen since the last Tall Ships in 2011. The event saw street furniture improvements such as new tables and chairs – provided by funding from the National Lottery’s ‘Awards for All’ Scheme.

Schemes such as the ‘Spend at the Street’ continue to be well used and importantly, contributes to a sustainable cyclical economy for the town centre. Themed window trails, Christmas events, treasure hunts etc, continue to draw people into the town centre. The street has also benefited from successful funding bids from various partners, which has resulted in a large number of businesses receiving improvement works to their building frontages. Public spaces have also seen continued maintenance and improvement works (painting, power washing etc).

BID funding sources continue to be invested into the provision of flowers, and the replacement of street bunting and Christmas lights. All providing positive improvements to our town centre that are enjoyed by locals and visitors alike.





(Source: Living Lerwick – [www.livinglerwick.co.uk/](http://www.livinglerwick.co.uk/))



Christmas streetlights and shop window displays bring welcome Festive cheer

## 5. Street Surveys and Data Collection

During the months of July and August 2025, several surveys were conducted at various locations within the boundaries of the town centre. Thirty-seven survey points were chosen - specifically for their location - and for their coverage of key town centre areas and features. This established a baseline for counts and surveys and will be used for future health checks, allowing accurate data collection points that can be monitored for changes over time.

The primary focus of the surveys was to determine what was available to users of the town centre in terms of businesses and retail choice, and also the overall condition of the town centre in terms of its buildings, street furniture, condition etc. In other words, street visitor experience both visually, physically, and retail choice.

The survey point locations are shown in Appendix B. As previously mentioned, these survey points will form the reference or baseline points for further town centre audits and health check updates.

Please note that the business units recorded during the surveys were identified based on visible signs of trading or operation within each premises. Some units may have recently closed at the time of the survey. The count reflects what was

observable at each survey point, and every effort was made to include all units as accurately as possible. In certain cases, local knowledge was used to confirm trading activity. While a very small number of units may have been missed, this is unlikely to affect the overall percentages presented in this audit.

Definition of a Unit: For this audit, a Unit is classed as a space within a building that is used for retail, office, business, industrial, studio, or any form of trading.

## 6. Health Check Indicators - Scores and Description

Health Check Indicators use a scoring from 1 – 5, with 5 being the highest score. These scores are derived from both quantitative data (e.g. footfall counts, vacancy rates) and qualitative assessments (e.g. surveys, site visits).

An overall performance indicator – ranging from Very Poor, Poor, Good, Very Good, Excellent - has also been used for the first time within this update for each section. By adding new scores alongside the 2018 scores, this will allow us to monitor and assess whether the town centre has improved or declined. Future health checks will continue to allow monitoring and assessment via the indicator scores and the performance indicators.

For the 2025, six categories have been used once again for the health check, and an average score has been taken for each from the 32 indicators within each category. This has been followed for the update to allow monitoring of each category and in more detail for each indicator. There has been a minor change with the addition of indicator 4: Short Term Let and Holiday Accommodation found within category Activity. This indicator has replaced Leisure and Tourism Facilities.

This shows that Lerwick town centre has scored **3.6 out of 5** for its second health check – shown against the 2018 Health Check in table 1 - this indicates an improvement across all the categories and indicators, and indicates that the town centre continues to display a wide range of services, a wide range of shops, high quality town centre environment and built environment, and a good quality user experience. A more detailed summary is provided within the conclusion of this audit.

Category	2018 Score	2025 Score	Performance
Retail & Professional Services	2.9/5	4.3/5	Very Good
Activity	3/5	3.8/5	Good
Physical Environment	3/5	3.4/5	Good
Property	2.5/5	3.3/5	Good
Accessibility	2.7/5	3/5	Good
Community	3/5	4/5	Very Good
<b>Overall</b>	<b>2.9/5</b>	<b>3.6/5</b>	<b>Good</b>

## Shetland Place Standard – Your Place, Your Say



Between the 7<sup>th</sup> February and 7<sup>th</sup> March 2025, the Shetland Islands Council conducted a Shetland-wide survey called Our Place – Your Say. Also known as the Shetland Place Standard. This survey was conducted following the success of the first Place Standard survey in 2016.

A total of 947 responses were received from all across Shetland, with 203 responses from the Lerwick and Bressay area. The survey once again, provided valuable feedback from Shetland's communities and provided much-needed data to be applied to this health check update.

The survey asked opinions on a wide range of subjects:

- Care & Maintenance
- Facilities & Services
- Feeling Safe
- Housing & Community
- Identity & Belonging
- Influence & Sense of Control
- Moving Around
- Natural Space
- Play & Recreation
- Public Transport
- Social Interaction
- Streets & Spaces
- Traffic & Parking
- Work & Local Economy

The Place Standard survey was able to identify three top priorities for the whole of Shetland. They were as follows:

- Top Priority: Public Transport
- 2<sup>nd</sup> Priority: Housing & Community
- 3<sup>rd</sup> Priority: Moving Around

A more detailed summary of the Place Standard survey relevant to the town centre area, can be found in section 11 Community of this audit. The final report can be found using the following link: [shetland-our-place-final-report-v1-3-060126](#)

## 6. Retail/Professional Services

### 1. Number of Multiple Retailers = 5

**2018 Score = 2**

**Performance = Excellent**

Multiple Retailers can be defined as a business that operates more than one retail outlet or store often under the same brand or company – often referred to as chain stores. 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, Superdrug, Specsavers, and Begg Shoes. 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. However, these larger retailers make up only 6% of all the retail shops within the town centre and only 2% of all the units counted within the town centre boundary area.

### 2. Variety of Specialist and Independent Shops = 5

**2018 Score = 4**

**Performance = Excellent**

Lerwick Town Centre offers an excellent range of locally produced goods and locally themed goods, sold from a wide range of specialist and independent shops operating along the length of the town centre. Of the 61 retail units counted, approximately 20 or 34%, sold craft and locally produced products. This is up from the last audit where approximately 13 units or 22% sold specialist or craft items.

People surveyed for the Place Standard – Our Place, Your Say, felt there were a good range of shops, however, some felt there were too many tourist-focused businesses.

### 3. Retailer Premises Demand = 3

**2018 Score = 2**

**Performance = Good**

During the 2018 survey, it was noted that a number of retail properties and businesses had remained on the market for a long period of time before being sold or leased. Examples included were Da Noost, Fine Peerie Cakes, The Harbour Fish and Chip Shop and Tatties and Point, some of which remained vacant at that time.

These premises are now all occupied with some high-quality renovation works undertaken to business units such as The Noost. It was noted that the unit formerly known as Tatties and Point, was presently occupied by Juice Culture, however, the unit looked closed for business at the time of survey.

At the time of the 2025 survey, there were a total of 16 units within the town centre boundary area that during the surveys, appeared visually vacant/empty and/or shut for business. This is approximately 8% of all the units counted, which is relatively low. It should be noted that approximately 7 vacant units sat within the prime shopping area of Commercial Street and are more visually prominent and noticeable, within some showing obvious signs of neglect.

Some units have remained unoccupied for a considerable time - notably the premises formerly known as The Stage Door adjacent to the Grand Hotel. During the survey work for this audit update, this unit was showing signs of dilapidation and was in need of basic maintenance. However, during the writing of this report, the unit has now been occupied by a salon and has undergone some repair and maintenance works and has been given a much-needed new lease of life. The improvements to the building has helped to improve the visual appearance and aesthetic quality of this survey point – this shows the continuing and ever-changing environment along the town centre.

It should be noted that there are a high number of occupied units currently on the market for sale, which if vacated, will have a noticeable negative impact on the town centre. Conversely, it should also be noted that there are currently vacant units on the market for sale – the units at the Market Cross for example – which if occupied, would have a positive impact on the town centre.

Vacancy information is covered within section 21 of this audit.

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 = 5**

**2018 Score = 3**

**Performance = Excellent**

The 2025 health check found that there is an excellent 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 and are of higher value, and where consumers will compare and contrast products and prices. Examples include clothing and fashion, electronics, home appliances, furniture, automobiles, jewellery and luxury goods and sporting equipment.

Of the 61 retail units counted approximately 26 or 44% were considered comparison goods, and 2 units or 3% were considered convenience goods.

People surveyed for the Place Standard – Our Place, Your Say, felt there were a good range of shops, that were generally high quality and accessible.



**44% Comparison goods**  
**3% Convenience goods**

## 5. Availability of Food Shopping = 2

**2018 Score = 2**

**Performance = Poor**

When compared to the number of comparison shops, there is still very little choice of food shopping within the town centre, where the customer can purchase a range of food items (weekly shop) – other than the limited availability of food on offer at the convenience shops such as Ellesmere Stores.

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, and since the last audit, Lerwick town centre has lost Anderson Butchers located along Commercial Road.

The 2018 audit reported “As of 6th November 2017 there were only 5 shops operating in the town centre boundary which predominantly sell food products, consisting of McNab’s fish shop, Don Leslie’s, JJ Taylors, Beverly’s World Foods and Anderson’s butchers. The other convenience store not selling food products is the wine shop”. Unfortunately, the town centre has lost all but Don Leslie’s – also known as Ellesmere Stores - since the 2018 audit.

People surveyed for the Place Standard – Our Place, Your Say, felt there were a need for more everyday shops and better opening hours.



## Lack of food shops

### 6. Diversity of Services = 4

**2018 Score = 4**

**Performance = Very Good**

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. These businesses provide a large range of services, such as architectural or property and legal, to hairdressing and banking.

This includes:

- 6 Financial services – including financial advisors
- 5 Legal services – including solicitors and legal practices
- 4 Banking services – high street banks
- 21 Professional services – including architects, surveyors, technical services, research and development



## **6 Financial, 5 Legal 4 Banking & 21 Professional services**

The town centre continues to offer a high number of public services, such as:

- Governmental and non-Governmental agencies
- Shetland Islands Council Services
- Hjaltland Housing Association
- Post Office
- Skills Development Scotland
- Business Gateway
- District Valuer Office

There has been a noticeable increase in personal care services on offer in the town centre that offer services ranging from hairdressing and grooming, to wellness, to tattoos. This number has more than doubled to 22 units – from 10 counted in 2018.

These personal care services include:

13 units that provide hairdressing and beautician services.

3 units that provide wellness services.

2 opticians and 2 tattoo studios.



**Hairdresser, beautician,  
wellness - (22 personal  
care and salons on  
offer)**

## 7. Scarcity of Charity Shops = 5

2018 Score = 3

Performance = Excellent

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 2 charity shops in the town centre, which is a reduction from the 4 counted in 2018. In terms of comparison and convenience retail unit choice this equates to only 7% are currently occupied by charity shops. The British Red Cross unit is currently up for sale and may open up opportunities to for further retail diversity.

When viewed as a percentage of all 201 units counted within the town centre boundary, this percentage falls to just 2% of all units are currently occupied by charity shops.



**2 Charity Shops**

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

2018 Score = 5

Performance = Excellent

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. The 2018 audit stated that in Lerwick town centre, this does not appear to be an issue as there is only one betting shop and there are no high interest money lending premises. This statement remains valid, as Lerwick currently has no areas where any high interest or betting shops trade. In 2022 Lerwick town centre saw the loss of its only betting shop and possibly indicated a change in how bets are predominantly placed – the unit is now home to Tooth and Nail Barbers.

## 7. Activity

### 1. Presence of Cafes, Restaurants and Pubs = 5

**2018 Score = 3**

**Performance = Excellent**

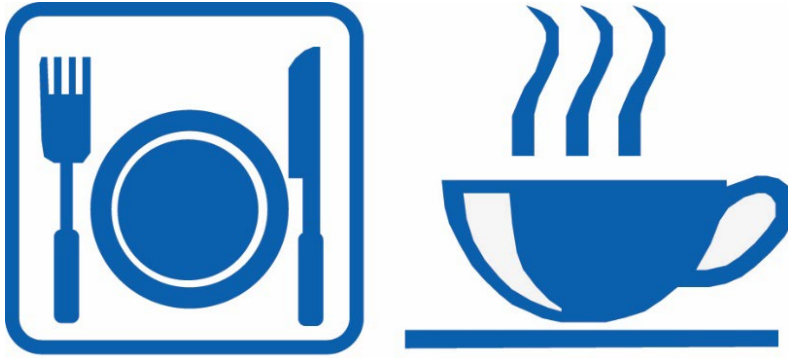
The town centre has an excellent variety of cafes, restaurants and pubs, and places where you take a seat and eat in, with many new businesses opening since the 2018 audit. New additions since the 2018 survey such as No. 88 and The Noost, bring a new vibrancy and footfall to the town centre. With new takeaway/eat-ins such as Blyed Welcome and Island Larder also positively adding to the town centre.

New additions to the street since the last audit, bring an additional vibrancy and consumer choice to the south end of the street



The Grand Hotel still offers its bars and restaurant for guests and visitors, however the COVID epidemic in 2020 saw the closure of Kveldrso Hotel, bar and restaurant, which at the time of this update, still remains closed. In total, within the town centre boundary, there are:

People surveyed for the Place Standard – Our Place, Your Say, felt there were a good range of restaurants and cafes that were generally of high quality.



## 15 Café Restaurants

### 2. Presence of Cultural and Community Facilities = 5

2018 Score = 4

Performance = Excellent

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. 2022 Saw the conversion of St Ringan's Church from the Lerwick Library to the Shetland Island Council Chambers, with the library facility moving into the converted and renovated building previously known as the Lerwick Museum and Library. This stand-alone library building has allowed excellent expansion of their services.

Islesburgh Community Centre is located just outside the town centre boundary and remains a much-used community building and cafe.





Lerwick's cultural quarter continues to entertain locals and tourists alike

### **3. Leisure and Tourism Facilities = 3**

**2018 Score = 3**

**Performance = Good**

A variety of facilities are located in the town centre which provide services for visitors. This includes a tourist office – which at the time of this update, is currently closed for renovation under new private ownership, 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. As previously noted, Kveldrso Hotel remains closed.

There are 6 guesthouses and B&Bs, and 2 hotels within the Lerwick town centre boundary.



#### **4. Short Term Let and Holiday Accommodation = 4**

**2018 Score = Not Previously Audited**

**Performance = Very Good**

As of September 2025, there are currently 171 properties in Lerwick who are registered with short-term let licences. Of that 171, there are currently 79 properties with short term let licences that are located within the Lerwick town centre boundary area.

Short term let can be defined as:

- Secondary letting – The letting of property where you do not normally live, for example, a second home that is let to guests
- Home letting – Using all or part of your home for short-term lets, whilst you are absent. An example of this could be whilst you are on holiday
- Home sharing – Using all or part of your own home for short-term lets, whilst you are there
- Home letting and home sharing – Operating short-term lets from your own home while you are living there and for periods when you are absent

Of the 79 registered short-term let properties:

- 69 are as Secondary Letting
- 3 are as Home Letting
- 6 are as Home Sharing
- 1 are as Home Sharing and Home Letting.

Approximately 12 are within the Commercial Street area and approximately 30 within the Lanes area.

(Source: Short Term Lets Register – Shetland Islands Council)

There are approximately 60 Airbnb listings registered for the Lerwick area.

Short-term let and holiday accommodation availability, can be a positive addition to town centres in terms of overall economic activity, and provide much-needed tourist and visitor facilities, but also short-term accommodation for temporary workers.

However, an overabundance of short-term lets and properties that offer Airbnb type holiday accommodation, can place a burden on housing stock for locals and people relocating to Shetland. It can increase property values and rents and make it harder to find affordable housing. It can also add to seasonal population shifts within town centres, and a loss of community feel and cohesion.

It was estimated that there are approximately 506 residential properties within the town centre boundary area. This would mean that approximately 15% of residential properties within the town centre are registered as short-term let. Based on national averages, Lerwick town centre would have a higher-than-average rate of short-term let properties.

(Source: [Lerwick Holiday Rentals & Homes - Scotland, United Kingdom | Airbnb](#))



**171 Short term let  
properties in Lerwick  
with 79 in the  
town centre**

#### **5. Properties above Retail/Business = 3**

**2018 Score = 3**

**Performance = Good**

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/nighttime economy. A growing residential community can also help support shops and businesses. The 2025 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 and many office accommodation, although there appears to be potential for more to be developed in certain areas of the street, further promoting the 24-hour town principle - where the town centre remains active and used after business closing hours.



Town centres want a healthy mixed use, as this helps promote stronger communities, urban regeneration, and helps sustain town centre economies

## 6. Evening/Nighttime Economy = 3

2018 Score = 2

Performance = Good

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 5<sup>th</sup> highest negative impact at that time.

The 2018 audit also noted that the town centre was particularly busy in the evening during weekends, with restaurants, takeaways and pubs opening late. The opening

of new cafes and pubs since the last audit, have had a positive impact on the nighttime economy of the street.

However, the majority of shops and cafes close at 5pm and through the week the street becomes very quiet after this time with an inevitable reduction in footfall. Evening cultural events and cinema screenings are mostly held at Mareel for example, although this has little impact upon footfall in the town centre as they will be predominantly accessed by car.



The addition of new restaurants and bars since the last audit, bring added nighttime economy and an alive-after-five feel to the town centre

With the loss of Harrison Square as an open event area through its change of use to a sitting/bench area, has further reduced the availability of open space areas for public events or pop-up events. Other than the Market Cross, there is a lack of public open space that can accommodate evening and nighttime events.

## 8. Physical Environment

Of the 37 survey points set out within the town centre boundary, 17 were chosen for physical environment surveys. These survey points were specifically picked for their location near or within parts of the town centre that included prominent buildings, pedestrian areas, street surfaces etc.

The intention is to assess and audit the physical appearance of the street, the available signage and open space, the overall condition of buildings, and the overall historic environment etc. The physical structure, appearance, and historic environment were all assessed against the Performance criteria of Very Poor, Poor, Good, Very Good, and Excellent. With changes since the last surveys in 2018 also being noted for future audits.



### **1. Regeneration Opportunities = 4**

**2018 Score = 3**

**Performance = Very Good**

The 2018 audit recognised the importance that town centres play in our everyday lives, and local and national policies support the ongoing regeneration and development of our towns, to help ensure future vitality and vibrance and importantly the sustainability of our town centres.

Due to Lerwick town centre's restricted topography, new development and expansion options are limited, unless regeneration opportunities arise in the form of demolition and rebuild, or conversion of existing. Again, 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. Some notable changes are as follows:

#### **Fort Road Regeneration:**

Since the 2018 audit, the town centre has seen some positive changes in the form of larger regeneration of existing sites, to changes-in-use of existing buildings. The demolition and regeneration of the former North Star Cinema and Mooney's Wake

pub by Hjaltland Housing Association – completed in 2015 and acknowledged in the 2018 audit - saw the site turned into much-needed residential development. The Excelsior Place regeneration project at Harbour Street saw the creation of 17 new flats for social rent.

In 2017, a further 12 new flats were added to the Excelsior Place development – again by Hjaltland Housing Association. The additional flats, located along the Fort Road area, has again helped the future sustainability of the town centre and helped maintain a vibrancy and life after business closing hours. It helped the town “stay alive after five” and highlights the importance of balancing different development types in and around our town centres.

### **Lerwick’s Former Fish Market:**

In August 2020, Lerwick Port Authority’s new fish market was opened at Mair’s Quay. The former fish market located in the town centre at Laurenson Quay, was noted in the 2018 audit as a potential for redevelopment or regeneration for new port and harbour activities. Originally built in 1975 and extended and chilled in 1993, with an existing added in 2009 that is currently used by the company Seaspray Shetland.

The building is a recognisable structure and part of the historic and current port and harbour activities. The building has undergone recent renovation works to its external fabric, with the aim of adding to its lifespan of approximately another 10 – 15 years (or possibly longer). No future plans have been set for the site, but any redevelopment by the Lerwick Port Authority would most likely be a continuation of port/industrial use.



Lerwick’s  
former fish  
market

### **Leog House:**

Previously used as a care facility and office space, the Category C listed building in Lerwick’s south end, was converted into five two-bedroomed flats in 2019. With a

site at its rear garden area with planning permission in place for change-of-use to a dwellinghouse site.

## Harrison Square

A well-designed public space is welcoming, accessible, and adaptable, supporting both everyday activity and social interaction. Good practice in urban design emphasises creating spaces that feel safe and inclusive, with clear sightlines, active frontages, and amenities that encourage people to linger—such as seating, lighting, and landscaping.

Since the last audit, new seating has been installed at Harrison Square and has added a pedestrianised feel to this area of the street. It is a much-used area of the town centre and has a vibrancy to it during the summer – fine weather – months.



Since the last audit Harrison Square has been turned into a permanent seating area and a much-used public space by young people and tourists

The alteration and inclusion of seats as a public space free from vehicles has not been without its issues, due to the perceived and observed rise in anti-social behaviour. During Youth Engagement sessions undertaken by the Planning Service, a high number of young people identified the need for more areas to ‘hang-out’ and meet up with friends in the town centre.

## Lerwick Lanes Feasibility Study

In 2024, a preferred option was approved by Members, for the demolition of old housing at Pitt Lane area and the construction of up to 15 new housing. This included the retention of the community garden area but slightly reduced in size.

The option set out concept designs that included the loss of up to 21 car parking spaces at the old swimming pool car park area, which during public consultation, proved controversial and stimulated a negative response.

This will be a large development for the Lerwick lanes area and will bring much-needed housing to the town centre; however, the project is still to be formally approved through the planning process and final designs may change.

### ***British Telecom Exchange Building***

The exchanged building at Water Lane/Greenfield place area of the south end, was highlighted in the 2018 audit, as an area with potential for future development. It is unlikely that BT will vacate this building, as their fibre optic communication equipment is housed at this location and the building may have security implications due to it being classed as national infrastructure. However, there may be areas that are not used that could potentially be considered for future regeneration and considered taking forward into the next Local Development Plan (LDP2).

### **The Knab Campus:**



The Knab Campus - the largest redevelopment and regeneration project in Lerwick in a generation

Photos supplied by ©Shetlandbydrone



In 2018 the health check acknowledged the future development of the Knab campus. The Knab is located at the southern boundary of Lerwick, approximately a five-minute walk from the town centre. The site presents substantial potential for additional residential development within Lerwick, alongside proposed facilities including a creative hub, student accommodation and enhanced public spaces.

The redevelopment is considered vital to supporting population retention and will bring increased footfall into Lerwick town centre.

Construction of the housing element will commence following completion of the infrastructure and public-realm contracts. It is anticipated that housing contracts will begin in 2025/26 and will be delivered in phases over several years in line with local demand. Depending on the final mix of housing types, approximately 140 homes are proposed. This increased supply will make a significant contribution toward reducing demand for social housing in Shetland, while also creating opportunities for home ownership and private development across a range of tenures.

(source: [The Knab: A thriving space with community at its heart](#))

## 2. Visitor Infrastructure (Street Signs and Furniture) = 3

2018 Score = 3

Performance = Good

A high standard of factual signage and visitor information on Lerwick is provided at Harrison Square, with seating now a permanent fixture. 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 and new window map at Elsemere Stores.

A good amount of seating/street furniture is provided along the esplanade with more being added since the last audit, and there is seating at both ends of the street with the most seating being available at the north end 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), and as stated, Harrison Square has now been lost as an events space, however, its change of use into a permanent seating space has added more resident and visitor infrastructure since the last audit.

Above – seating at the north end of the street. To the right - the seating being used by tourists enjoying the local deep-fried cuisine



Harrison Square has been turned into a permanent seating area since the last audit

### 3. Physical Structure = 4

2018 Score = 3

Performance = Very Good

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. Similar to the 2018 walk-through inspection, the 2025 surveys found the physical structure of buildings in a generally good to very good condition, with noticeable improvements since the last audit on things like downpipes and guttering. However, redundant cabling still remain on many buildings along the street,

A high number of the buildings are in very good to excellent condition. However, some buildings still remain in need of repair – for example, guttering, slates and windows. Elesmere shop for example, is showing concerning signs of sandstone deterioration.

The 2025 Lerwick Lanes Conservation Area Character Appraisal notes that the vast majority of the buildings within the conservation area are well maintained. However, a number of cases of stone erosion were noted due to the use of cement mortars and renders in the saline environment of the harbour, and in some cases severe erosion and degradation of sandstone facing and finishings etc. This type of damage can lead to more serious problems in the future.



The majority of building within the town centre, are of a very high quality and in excellent condition. However, some prominent buildings are clearly showing signs of stone erosion and are in need of repair.

The 2025 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.

#### 4. Appearance of Buildings = 4

2018 Score = 3

Performance = Very Good

The majority of buildings and shopfronts are of very good quality and contribute to the architectural quality of the town centre and Conservation Area, although some buildings would benefit from general maintenance and tidying up, with one or two buildings showing signs of dilapidation and neglect. As stated in section 3 Physical Structure many buildings have redundant cabling littered across their facades, which could easily be tidied up without incurring much cost.

One prominent building that was noted in the 2018 audit that was showing signs of steady deterioration and dilapidation, was the former retail unit situated adjacent to the entrance to the Grand Hotel. As mentioned earlier in this report, the building was vacant during the initial survey work but has now been occupied by a new salon and appears to be being prepped for external painting. The window displays are a huge improvement visually. This has greatly improved the visual amenity of this part of the town centre and joins other newly renovated and improved units within this survey point.





A long-vacant property that was identified in the 2018 audit as showing signs of neglect and dilapidation, has now taken on a new lease of life, and brings a welcome improvement to this area of the street

People surveyed for the Place Standard – Our Place, Your Say, felt that some buildings in the town centre looked derelict and unsightly, with the BT exchange building getting a particular mention.

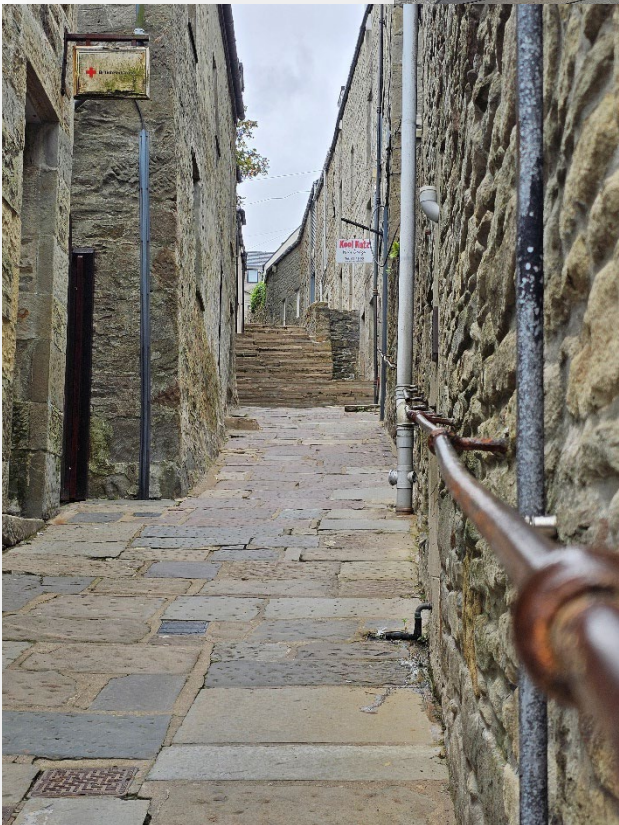
## **5. Cleanliness/Attractiveness = 4**

**2018 Score = 3**

**Performance = Excellent**

The waterfront location and the high-quality historic environment add to the attractiveness of the town centre. It was noted in the 2018 audit, that the Living Lerwick Baseline Survey of Businesses, undertaken in 2011, ranked improvements to cleanliness as the 3<sup>rd</sup> highest priority for the BID to improve. Many improvement works have been made during this time, including street furniture, art installations etc, along with continued maintenance such as painting and gutter clearing continues.

The street and its lanes are well kept and clean, and always offer pleasant views – now with new art installations to enjoy



The main core of the town centre and outlying areas are generally well maintained and free of litter.



A large temporary tarmac section at the Harry's Toy Shop end of the street, where broken and failed flagstones were removed, has now been replaced and the works completed to a very high standard.

To date, Commercial Street still has a high number of areas where broken flagstones have been removed and temporarily filled with tar mac. However, repair works have been made and are continuing to be made along the main street area and around the town centre, with current works on flagstone repairs on-going at the time of this audit update.

From 2026 onwards, Lerwick town centre will see the continuation of reflagging works at various areas along Commercial Street and south Commercial Street, starting in August/September 2026 with works continuing through the street until approximately 2032.

The Shetland Islands Council's Road Services section have spent over £400,000.00 on repair works and improvement works in and around Lerwick town centre between the period of 2019 and 2025. These works are not limited to slab maintenance and replacement, but include a wide variety of works, which sometimes go unnoticed by users of the town centre but should be mentioned in this audit.

Works (including repairs and maintenance) undertaken by Road Services range from:

- Handrail
- Footway/paths
- Carriageway/roads
- Kerb
- Retaining wall
- Gullys
- Piped drainage
- Signage

(Sources – SIC Road Services Section)



Maintenance works have been completed to a high standard, but many slabs still await replacement and repair

People surveyed for the Place Standard – Our Place, Your Say, felt that generally the areas around Lerwick were clean and tidy and praised the Shetland Islands Council for street and road cleaning. A recurring issue was dog fouling on pavements with litter being mentioned for the Lerwick area, near the school and beaches, with stricter enforcement suggested and more bins being made available.



## 6. Historic Environment = 4

2018 Score = 4

Performance = Very Good

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.



Lerwick town centre offers an extremely high-quality historic environment and conservation area, peppered with listed buildings

Left – the old Toll Booth now the RNLI building



Right - one of Lerwick's Lodberrie (Lodberrie photo sourced from the Conservation Area Character Appraisal 2025)

As of September 2025, the Buildings at Risk Register identified 3 'at risk' properties that fall within the town centre boundary. This is down from the 4 identified in the 2018 with the removal of Harbour Court. It should be noted that at the time of writing this audit update, work on the Buildings at Risk Register has currently been suspended pending a decision on its future.

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

(source Buildings and Risk Register for Scotland)

The Lodberrie [The Lodberrie, 20, Commercial Street, Lerwick | Buildings at Risk Register](#)

Storehouse [Storehouse, Market Green Car Park, Lerwick | Buildings at Risk Register](#)

St Clements Hall [St Clement's Hall, St Olaf Street, Lerwick | Buildings at Risk Register](#)



## 7. Availability and Quality of Public Space and Green Infrastructure = 3

**2018 Score = 2**

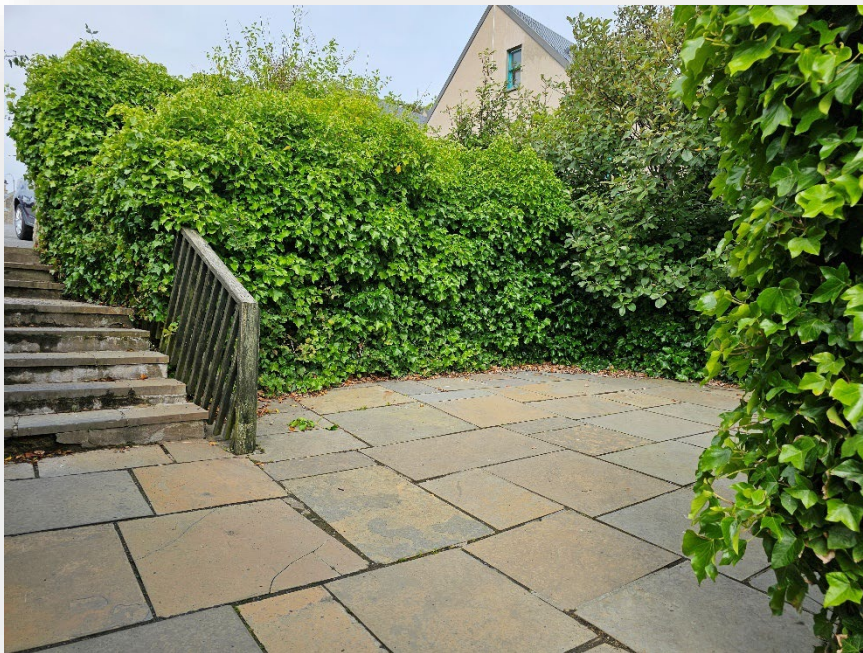
**Performance = Good**

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.

Community garden at Pitt Lane that offers some green public open space



In March 2017 a community garden and playground was granted temporary planning permission (5yr maximum) and this was again granted in 2021 for the Pitt Lane garden/public space area. This area remains well maintained, reasonably sheltered and provides seating and tables and appears to be 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. Conservation Area Consent has also been granted for the demolition of the remaining houses at Pitt Lane, with the site to be landscaped pending redevelopment.



A small open space area at the top of Burns Lane

People surveyed for the Place Standard – Our Place, Your Say, felt that there were few natural or wild areas in the centre of Lerwick, and have suggested more trees, wildflowers, and benches.

## 9. Property

### 1. Low Vacancy Rates = 3

2018 Score = 2

Performance = Good



The average Scottish town centre shop vacancy rate was 12.3% in 2023-2024 – with some areas of Scotland reaching 30%. Lerwick's town centre vacancy rate over the same period was 5.8%. This is well below the national average and down from the last audit

(source: <https://www.improvementservice.org.uk/benchmarking/explore-the-data>)



Some newly vacated properties such as Bayes left, and some that have sat vacant for a considerable time but are now seeing a new lease of life.

The continuing changes experienced by town centre users, in terms of the shops and retail choices on offer. Driven by many factors such as economic changes, and changes in consumer habits.

Some properties remain long-term vacant such as the Anderson Butchers premises on Commercial Road



Registered Vacant Properties within the approximate town centre area, currently in receipt of empty property relief.

Property Type	Building Information
Retail/Office	TSB Esplanade
Office	Hillhead
Office	122 Commercial Street
Retail/Commercial	1 Gardie Court
Retail/Commercial	103 Commercial Street
Retail/Commercial	101 Commercial Street
Retail/Commercial	155 Commercial Street
Retail/Commercial	143 Commercial Street
Retail/Commercial	11 Harbour Street
Office	Fort Road
Retail/Commercial	49/53 Commercial Road
Hall	St Olaf Street
Retail/Commercial	24 Commercial Road
Retail/Commercial	Mounthooly Street
Office	4B Reform Lane
Room/Office	6, 2 Harbour Street
Room/Office	7, 2 Harbour Street
Retail/Commercial	Thorfinn Street
Office	11 Market Street
Retail/Commercial	165 Commercial Street

Within the town centre there are currently 9 premises for sale at the time of writing this audit.

### Properties Currently on the Market for Sale

Premises	Address	Additional Info
Retail/Commercial	90-92 Commercial Street	Currently J.G. Rae Trading Ltd
Retail/Commercial	101 Commercial Street	Previously Laing's Pharmacy
Retail/Commercial	103 Commercial Street	Previously Soap Company & Chocolatier
Retail/Commercial	125-127 Commercial Street	Currently British Red Cross
Retail/Commercial	161 Commercial Street	Burns Lane
Retail/Commercial	163 Commercial Street	Burns Lane Clothing
Retail/Commercial	Harrison Square	Lerwick DIY
Retail/Commercial	Commercial Street	Previously The Annex
Retail/Commercial	27 Commercial Street	Currently Home Furnishings

*(Data source: Empty Property Relief: Shetland Islands Council Finance Section)*

## 2. Low Number of Vacant Sites = 4

**2018 Score = 3**

**Performance = Very Good**

There are a few gap sites or vacant sites within the town centre noted within the 2018 audit, and this has not changed considerably. The BT exchange building was noted as a possible future redevelopment project, however, all fibre communications across Shetland enter this building, so any future redevelopment possibilities are limited. There may be vacant parts of the building available for demolition and redevelopment, however, possible security issues may arise due to its possible designation as national infrastructure and safeguarding around the building.

The 2018 audit noted 66-72 Commercial Road (former HNP Engineering premises), which was granted planning permission in 2016, failed to be realised as student accommodation. To date it still remains undeveloped as an edge-of-town centre site with development potential. Since the last audit, the building adjacent to the former HNP on Commercial Road, has now been occupied by The Hub and offers youth and employment services.



The former HNP building and site remains undeveloped

### 3. Prime Rental Values = 3

2018 Score = 2

Performance = Good

Information on the non-domestic rateable value of properties in the town centre was taken from the Scottish Assessors' Association (SAA) Rateable Value [Search – Scottish Assessors](#) and 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 in 2025, and of the approximately 70+ traders looked at, their average yearly rateable values are as follows:

- Smaller sized shops - £6,197.22
- Medium sized shops - £11,760.00
- Larger sized shops - £33,570.00.

Not surprisingly, this average rateable value has risen from the 2017 values, noted then as small £4,000, medium £8,000, and larger shops at £20,000.

The lowest rateable value – or rent - for a trader in Lerwick town centre in 2025 was £810, with the highest being £54,000.

An average smaller town centre's typical rateable value in 2023 fell between £5,000.00 - £15,000.00. This value is common in smaller towns and rural areas across Scotland. Medium retail units saw a rateable value of between £20,000.00 - £75,000.00, often in larger towns and shopping centres, again across Scotland.

It should be noted that tenants in Lerwick town centre can access reductions and relief on their rateable value through several schemes administered by the Shetland Islands Council and the Scottish Government. These include small business relief, empty property relief, and charitable relief.

Small business relief or the small business bonus scheme can apply if your property's rateable value is below £15,000, which would mean that upwards of fifty shops in Lerwick town centre/Commercial Street, could apply this business relief. Please note that this is a very rough summation as other assessments and/or criteria may apply in gaining any business relief.

There are two charity shops currently trading in Lerwick town centre – both shops could claim a mandatory 80% relief, with councils able to top this up to 100%.

## 10 Accessibility

### 1. Pedestrian Footfall = 3

**2018 Score = 2**

**Performance = Good**

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.

Footfall can be defined as the movement of people past a particular location over a specified period of time (e.g. average hourly counts). For the 2025 town centre health check update, new footfall surveys were conducted and as per the 2018 footfall count, data was collected at two times of the day (peak/off peak) and on different days of the week in 3 preselected locations along Commercial Street. The Tuesday survey date was purposely planned to coincide with a cruise ship visit – the Aidasol - for information and data collection purposes. The three main surveys were undertaken on Tuesday the 2<sup>nd</sup> of September, Friday the 5<sup>th</sup> of September 2025, and Saturday 27<sup>th</sup> of September.

Additional single location surveys were also conducted on Wednesday the 3<sup>rd</sup> of September between 1230 - 1330 at the south Commercial Street point, and on Thursday 4<sup>th</sup> of September between 1430 - 1530 at the central Commercial Street point.

Footfall numbers were collected using a fixed point and the number of times a pedestrian crossed that line within the hour. Children and infants who would not normally visit the town unaccompanied, were not included in the counts. Data from the 2018 footfall counts are also presented for comparison purposes and a map showing the survey locations is provided in Appendix B.

During the Saturday survey Wool Week was taking place in Shetland. It must be noted that it was difficult to find a day or weekend where some kind of activity or organised event was taking place – and this should be noted as a good thing and a sign of vibrancy and health in our town centre.

More information on Shetland visitors, can be found here [Shetland Visitor Surveys – Shetland Islands Council](#)

#### 2025 Pedestrian Footfall Surveys

	<b>Tuesday 2<sup>nd</sup> Sept 2025 (Cruise Liner) 1230 - 1330</b>	<b>Wednesday 3<sup>rd</sup> Sept 2025 1230 - 1330</b>	<b>Friday 5<sup>th</sup> Sept 2025 1230 - 1330</b>	<b>Saturday 27<sup>th</sup> Sept 2025 (Wool Week) 1230 - 1330</b>
<b>North Commercial Street (Harry's)</b>	849		234	312
<b>Central Commercial Street (No. 88)</b>	873		349	519
<b>South Commercial Street (Post Office)</b>	544	186	189	211
<b>Footfall Total Within 1hr Period</b>	<b>2266</b>		<b>772</b>	<b>1042</b>
<b>Average</b>	<b>755</b>	<b>186</b>	<b>257</b>	<b>347</b>

	<b>Tuesday 2<sup>nd</sup> Sept 2025 (Cruise Liner) 1430 - 1530</b>	<b>Thursday 4<sup>th</sup> Sept 2025 1430 - 1530</b>	<b>Friday 5<sup>th</sup> Sept 2025 1430 - 1530</b>	<b>Saturday 27<sup>th</sup> Sept 2025 (Wool Week) 1430 - 1530</b>
<b>North Commercial Street (Harry's)</b>	437		246	315
<b>Central Commercial Street (No. 88)</b>	557	255	405	421
<b>South Commercial Street (Post Office)</b>	349		149	187
<b>Footfall Total Within 1hr Period</b>	<b>1343</b>		<b>800</b>	<b>923</b>
<b>Average</b>	<b>448</b>	<b>255</b>	<b>200</b>	<b>308</b>



## Footfall

The 2025 footfall findings show a large – and obvious - increase in pedestrian movement during a cruise liner visit and shows how the town centre is positively impacted during their visits in terms of street visitor numbers. The 1230 – 1330 period saw 2,266 pass by the count point, nearly tripling the footfall count of 772 during the same period when a cruise liner was not in Lerwick. The number falls by over 900 for the afternoon period, to 1,343 passing the count point, compared to a non-cruise liner day of 800.

For comparison purposes, the first count between 1230 and 1330 during a cruise liner visit, saw only 326 more footfall than during a lunch time period while the

Anderson High School was still sited at the Knab. Highlighting the lunchtime impact on the town centre when the school moved to Clickimin.

During the Friday count, 772 pedestrians passed the count point during the 1230 – 1330 period and 800 during the 1430 – 1530 period. This is down from the 2017 count of 1,260 during the 1230 – 1330 period and 970 during the 1430 – 1530 period, but not significantly.

### 2017 Pedestrian Footfall Surveys

	Friday 25 <sup>th</sup> Aug 2017	Friday 25 <sup>th</sup> Aug 2017	Friday 6 <sup>th</sup> Oct 2017	Friday 6 <sup>th</sup> Oct 2017
	1230 - 1330	1430 - 1530	1230 - 1330	1430 - 1530
<b>North Commercial Street (Harry's)</b>	567	207	315	234
<b>Central Commercial Street (No. 88)</b>	713	407	536	370
<b>South Commercial Street (Post Office)</b>	667	356	407	365
<b>Footfall Total Within 1hr Period</b>	<b>1947</b>	<b>970</b>	<b>1258</b>	<b>969</b>
<b>Average</b>	<b>649</b>	<b>323</b>	<b>419</b>	<b>323</b>

For information: The 2017 footfall counts were deliberately timed during lunch breaks and school class times, to observe the impact the Anderson High School bairns had on the town centre. The above numbers show a term time count in August and a non-term time count in October.

## 2. Public Transport Infrastructure and Facilities = 3

**2018 Score = 3**

**Performance = Good**

Lerwick has a regular daytime (8-5pm) town centre bus 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, primarily due to the available space at the public toilet/bus stop area. The negative impact visually that a bus shelter would have on the surrounding

buildings and town centre conservation area, would be a reason to resist the installation of a shelter structure at the Harrison Square location.



The Viking bus station photographed in 2018 remains Lerwick's main transport hub alongside the much-used Esplanade bus stop

### **3. Accessibility of Town Centre = 3**

**2018 Score = 3**

**Performance = Good**

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 still 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. Lack of car parking has been identified by users of the town centre. A number of car parking locations are 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.

Tactile paving surfaces and crossing points for the visually impaired street user



It was noted in the 2018 audit, that 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. Also, tactile surfaces delineating pathways and edge-of carriageways for people with sight impairment (see photos above).

Further 20mph zones have been applied around Lerwick and the town centre in-line with the 'Scottish Government and Scottish Green Party Shared Policy Programme' published in 2021, which included a commitment that all appropriate roads in built up areas should have a safer speed limit of 20 mph by 2025.

Commercial Street, from the Market Cross to Commercial Road (Fort Café & Takeaway), 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.

People surveyed for the Place Standard – Our Place, Your Say, felt that disabled parking within the town centre area was not displayed clearly, and dropped kerbs were required in certain areas. Better accessibility and maintenance along the street was also mentioned, with some areas of the town centre being described as “no-go areas” for disabled people, with suggestions to make them more inclusive.



The small boat harbour seating area – pictured in 2018

#### **4. Accessibility to Premises = 2**

**2018 Score = 2**

**Performance = Poor**

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 and August and it was noted that some premises (such as banks) have dedicated access for disabled people, whilst others have ramps available on request. However, a high number of shops remain inaccessible with door entrances being too narrow or too high.

It should be noted that the disabled access and egress issue is not unique to Lerwick town centre. Many shop entrances are challenging to alter physically within the constraints of the existing building layout and in the case of Lerwick town centre, within the constraints of where the entrance is located on the narrow street. Altering a shop entrance door can also be challenging to do without destroying or negatively

affecting the historic appearance of the shop frontage, and the setting of the Conservation Area. Some of these buildings may be listed, which may also pose additional constraints on physically altering a building's doorway.

It should also be mentioned that the disabled changing area at the public toilets, is a well-used facility and a positive addition to the town centre.

People surveyed for the Place Standard – Our Place, Your Say, felt that many shops and restaurants on the street are not accessible for wheelchair users. Suggestions included adding ramps, and also making it clearer that ramps are available on request.

## **5. Ease of Movement = 2**

**2018 Score = 2**

**Performance = Poor**

In the 2018 audit, it was noted that 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.

During footfall surveys at the south end of the street - located at the Royal Bank of Scotland/Post Office area - vehicular surveys were also conducted. This was to help gain an on-going and informed understanding of how the south end is used by vehicles, and if they may or may not, contribute to poor experiences for pedestrians using the shops at that end of Commercial Street.

In the 2018 audit, it was stated that the main impact upon ease of movement for pedestrians in the town centre was the presence of cars. The traffic survey demonstrated that vehicle owners were continuing to access parts of the street despite it being a no traffic zone. Due to the street being narrow, there was also some conflict between pedestrians and vehicles with pedestrians often have to move out of the way to let them pass. Cars were also noted parking in disabled spaces and unmarked places outside shops along the street, predominantly outside the Royal Bank of Scotland, the Market Cross, and Bank of Scotland.

The recent surveys conducted at the south end/Royal Bank of Scotland survey point area in September 2025, showed a slight improvement to vehicular use along this part of the street in terms of number of vehicles on average per the hour – this was cars and commercial vehicles driving past the Shetland Times Bookstore towards the Market Cross (and beyond at times) and cars and commercial vehicles parking in and around the Royal Bank of Scotland/Shetland Times Bookstore area. However, it was also noted that high number of unauthorised vehicle users chose to park in disabled spaces.

The cars along the street continue to cause issues – and at times nuisance – to pedestrians visiting south Commercial Street and the Market Cross area. This may – at times - contribute to a poor street user experience while shopping or using this part of Commercial Street.



Vehicles entering the street from the south end, continue to affect pedestrian experience

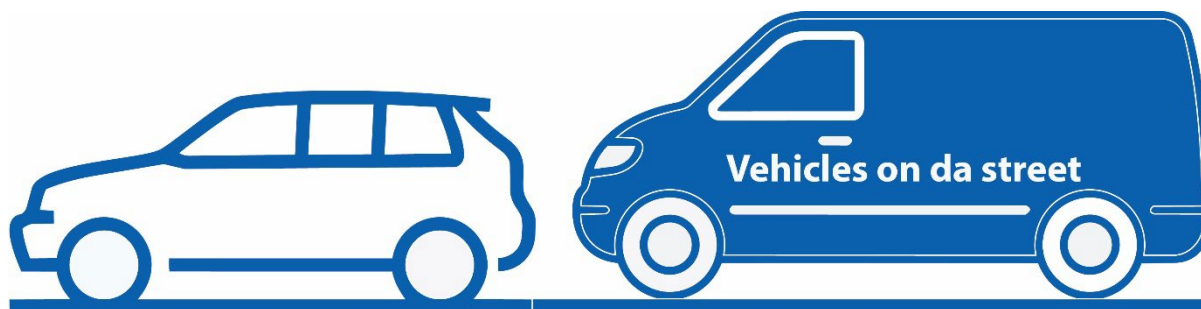
The vehicle numbers data for the south end Royal Bank of Scotland survey point, is presented in the table below. Included in this survey as stated, is the use of disabled spaces.

In the 2018 audit, it was reported that on average, the south end of Commercial Street (Shetland Times to Market Cross) experienced 55 cars per hour and 11 vans/commercial vehicles an hour. The latest survey saw on average over all the survey times - 35 vehicles an hour pass this part of the town centre. Whilst down from the 2018, this number still equates to approximately just over one car every two minutes.

The unauthorised use of disabled parking spaces was high during the survey times. For example, the Tuesday survey between 1230 – 1330 noted disabled parking spaces were used 8 times and in all of those times, the parking areas were used by abled persons not displaying authorisation to use the spaces. Similar was observed during the Wednesday 1230 – 1330 survey, where the 4 times the disabled spaces were used, not one vehicle user displayed relevant authorisation.

As noted in the 2018 audit, due to the amount of people using vehicles to access the street, careful consideration would need to be given to making further restrictions as

this could impact negatively on trade for shops and services in the town centre. There is no change to that statement for the 2025 audit.



### 2025 Vehicle Count

South Commercial Street (Post Office)	Tuesday 2 <sup>nd</sup> Sept 2025 (Cruise Liner) 1230 - 1330	Wednesday 3 <sup>rd</sup> Sept 2025 1230 - 1330	Friday 5 <sup>th</sup> Sept 2025 1230 - 1330	Saturday 27 <sup>th</sup> Sept 2025 (Wool Week) 1230 - 1330
Cars	29	34	33	27
Vans/Commercial	8	10	3	2
Disabled Spaces Used	8	4	3	2
Disabled spaces used by vehicles not displaying blue badge	8	4	0	2
<b>Total Number of Vehicles During the Hour</b>	<b>37</b>	<b>44</b>	<b>36</b>	<b>29</b>
	Tuesday 2 <sup>nd</sup> Sept 2025 (Cruise Liner) 1430 - 1530	No Wednesday 1430-1530 survey undertaken	Friday 5 <sup>th</sup> Sept 2025 1430 - 1530	Saturday 27 <sup>th</sup> Sept 2025 (Wool Week) 1430 - 1530
Cars	29		30	34
Vans/Commercial	2		1	0
	4		5	1

<b>Disabled Spaces Used</b>				
<b>Disabled spaces used by vehicles not displaying blue badge</b>	3		4	0
<b>Total Number of Vehicles During the Hour</b>	31		31	34
<b>Average number of vehicles over the survey times</b>	35			

## 6. Parking on Offer = 3

2018 Score = 4

Performance = Good

It was stated in the 2018 audit, that there were 744 parking spaces and 39 disabled spaces available in the BID area, and to date this number should not have changed, or changed significantly. [www.livinglerwick.co.uk/town-centre](http://www.livinglerwick.co.uk/town-centre)

The highest number of spaces are still found at the Hillhead car park - or Old Swimming Pool car park as it is also known as (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 is privately owned - and this may deter some users and encourage them to park inappropriately along the street.

Living Lerwick have conducted a car parking survey during trading hours and in November 2025, a car parking study was given the green light and will be conducted by Roads Service in 2026. The scoring for the 2025 audit has been marked down to 3 – Good. This is in response to the feedback from users of the street noted from studies, surveys, proposed town centre developments, and news reports.

### Parking Spaces in Lerwick Town Centre BID Area

<b>Area</b>	<b>Spaces</b>	<b>Disabled</b>
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
<b>Total</b>	<b>744</b>	<b>39</b>

## 7. Safety and security = 5

**2018 Score = 3**

**Performance = Excellent**

Lerwick's town centre CCTV system was first launched in 2010. A network of 14 cameras installed across Lerwick town centre, stretching from Harbour Street to Pete's. The system was designed to operate 24/7, feeding images back to the police station, but by 2022 the CCTV network was described as no longer fit for purpose and some had stopped working. In 2024 there was debate on the future of the monitoring system, with Shetland's Police Commander suggesting that the funds required to replace the CCTV system, may be better used for youth engagement or other community engagement programmes. At the time of writing this audit, it is noted that the CCTV system has been identified for dismantling and removal from the town centre.

During the daytime 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.

Crime rate in Shetland is less than half the national average, with a total of 814 crimes recorded in the 2024 period (including road traffic offences) – 520 crimes excluding road traffic offences.

With a population of approximately 23,000, this equates to 22 crimes per 1,000 people. Lerwick does see more incidents than rural areas, simply because of its higher population density and role as the hub for nightlife, shops, and services.

However, Lerwick's crime levels remain low compared to Scottish towns of similar size. The most common issues tend to be minor theft, antisocial behaviour, and road traffic offences, rather than serious violent crime.

(source: [Shetland Islands Council Ward Crime Map - Scotland's data on a map](#))



Police Scotland sets priorities for Shetland based on local data, community feedback, and national strategy. Their top three priorities for the Shetland Islands can be summarised as follows:

### 1. Road Safety and Road Crime

- Focus on reducing accidents and fatalities on rural roads.
- Tackling dangerous driving, speeding, and drink/drug driving.
- Ensuring safe transport links, which are vital in an island community where roads are the main arteries of daily life.

### 2. Serious Organised Crime

- Disrupting drug supply chains and tackling criminal networks.
- Preventing exploitation, including human trafficking and financial scams.
- Working with national units to address threats that reach even remote areas like Shetland.

### 3. Crimes of Theft and Dishonesty

- Addressing burglary, shoplifting, and fraud.
- Protecting local businesses and residents from financial harm.
- Building community trust by reducing everyday crime that directly impacts quality of life.

While those are the top three, the Shetland Local Policing Plan also highlights other important areas:

### 1. Antisocial behaviour, violence, and disorder

2. **Protecting vulnerable people** (e.g., elderly, children, those at risk)
3. **Counter-terrorism and public order**

(Source: [Shetland Island - Police Scotland](#))



Lerwick  
Lanes

People surveyed for the Place Standard – Our Place, Your Say, felt that the town centre was fairly safe, with low crime levels compared to other places.

## 11. Community

**1. Attitudes, Perceptions and Aspirations = 4**

**2018 Score = 3**

**Performance = Very Good**



As stated in section six, between the 7<sup>th</sup> February and 7<sup>th</sup> March 2025, the Shetland Islands Council conducted a Shetland-wide survey called Our Place – Your Say. Also known as the Shetland Place Standard. This survey was conducted following the success of the first Place Standard survey in 2016.

A total of 947 responses were received from all across Shetland, with 203 responses from the Lerwick and Bressay area. A very general summary is provided below that sets out the responses applicable to the Lerwick town centre area. As far as specific comments allowed, and as far as possible, comments relating to the town centre were captured from the Our Place – Your Say survey. However, please note that some comments may be Lerwick-wide in their reference and not town centre specific.



Responses relevant to the town centre can be summarised as follows:

### **Positive Points**

- **Shops and cafés:** There is a good range of shops and restaurants/cafés, generally high quality and accessible.
- **Facilities:** Leisure centres, parks, and public amenities like Mareel, Clickimin, and the Town Hall are considered excellent and well maintained.

- **Safety:** The town centre is seen as fairly safe, with low crime levels compared to other places.
- **Walkability:** Pavements and paths are abundant, making it easy to move around on foot.
- **Free parking:** Most parking areas are free, which is appreciated.

## Issues Raised

- **Parking problems:**
  - Very limited parking in the centre, especially during cruise ship season.
  - Indiscriminate parking on streets and blocking visibility at junctions.
  - Calls for a multi-storey car park (e.g., old swimming pool site) and better enforcement of parking rules.
- **Traffic and congestion:**
  - Cars allowed on Commercial Street despite pedestrianisation rules; some want it fully pedestrianised.
  - Speeding and lack of enforcement of 20mph zones.
- **Maintenance concerns:**
  - Pavements around the library and town hall need attention.
  - Some buildings in the centre are derelict or unsightly (e.g., old phone exchange, Knab buildings).
  - Litter, weeds, and dog fouling are recurring complaints.
- **Lighting:**
  - Poor lighting in certain lanes and streets, making them feel unsafe at night.
- **Limited green space:**
  - Few natural or wild areas in the centre; suggestions for more trees, wildflowers, and benches.
  - Limited Civic Space apart from the street itself.
- **Social spaces:**
  - Lack of indoor places for young people and families that aren't pubs.
  - Islesburgh and Town Hall could be used more for community events.
- **Shops and economy:**

- Commercial Street feels “dying out” with limited variety and too many tourist-focused businesses.
- Calls for more everyday shops and better opening hours.
- **Tourism impact:**
  - Facilities struggle during tourist season; restaurants and amenities become overcrowded.
  - Cruise ship days cause congestion and parking issues.
  - People surveyed for the Place Standard – Our Place, Your Say, felt there were a good range of restaurants and cafes that were generally of high quality.

### Suggestions for Improvement

- **Parking:** Build multi-storey car parks, introduce park-and-ride, and enforce parking restrictions.
- **Pedestrianisation:** Fully pedestrianise Commercial Street and improve crossings.
- **Maintenance:** Regular pavement repairs, weed spraying, and better upkeep of public spaces.
- **Lighting:** Upgrade street lighting in dark areas and lanes.
- **Green spaces:** Add benches, trees, and wildflower planting; create small pocket parks.
- **Community spaces:** More indoor venues for socialising without alcohol; better use of Islesburgh and halls.
- **Retail mix:** Encourage diverse shops and affordable cafés; improve opening hours.
- **Tourism management:** Better planning for cruise ship days and staffing for hospitality.

### Accessibility in Buildings and Shops:

- Many shops and restaurants on the high street are not made accessible for wheelchair users. Suggestions include adding ramps and making them clearly visible for easy request.
- Comments mention making buildings accessible for those with disabilities and improving facilities like public halls and leisure centres to meet modern accessibility standards.

### **Public Spaces and Infrastructure:**

- Mentions of poor disabled access in some areas, including signage for disabled parking and dropped pavements. Calls for better accessibility and maintenance.
- Some areas are described as “no-go” for disabled people, with suggestions to make them more inclusive.

### **Transport and Streets:**

- Issues with bus design and space for wheelchairs, and concerns about pavements and kerbs being unsuitable for prams and wheelchairs.

### **Cleanliness**

- Play parks and leisure areas: While some parks are praised as “well maintained,” others are called “filthy” or “outdated,” with requests for better upkeep and modern equipment.
- Many respondents say their areas are “generally clean and tidy,” and praise the council for street and road cleaning.
- Dog Fouling & Litter: A recurring issue is dog mess on pavements and litter, especially near schools and beaches. People want stricter enforcement and more bins.
- Grass cutting standards and leftover clippings blowing around were noted as problems.
- Tourist Impact: Beaches and popular spots sometimes suffer from litter and broken glass during busy periods.

### **Shetland Islands Council**

#### **Positive Mentions**

- Some respondents say the council does a good job maintaining streets, cleaning, and providing services like gritting in winter.
- A few comments note that community councils are approachable and receptive to concerns.

#### **Negative Mentions**

- Several comments state that the council and local authority do not listen to community opinions, consultations feel like a “tick-box exercise,” and decisions seem pre-determined.
- Lack of regular and planned maintenance; communal areas, and council properties, issues like weeds, moss, broken fences, and potholes persist.

### Suggestions for Improvement

- Implement regular, planned upkeep of pavements, communal areas, and council housing.
- Speed up building programs, reuse empty properties, and provide affordable options.
- Multi-storey car parks, park-and-ride schemes, and enforcement of illegal parking.

Living Lerwick’s 2011 Baseline Survey of Business also noted that the town centre would also benefit from improved 4G mobile coverage. This continues to be an on-going issue and there has been renewed calls to improve the 4G signal across Lerwick and the town centre, especially during cruise ship visits. At the time of writing this update, there has been no definitive confirmation that this issue will be resolved for all network users within the town centre.

## 12. Health Check – Conclusion



Category	2018 Score	2025 Score	Performance
Retail & Professional Services	2.9/5	4.3/5	Very Good
Activity	3/5	3.8/5	Good
Physical Environment	3/5	3.4/5	Good
Property	2.5/5	3.3/5	Good
Accessibility	2.7/5	3.0/5	Good

Community	3/5	4/5	Very Good
<b>Overall</b>	<b>2.9/5</b>	<b>3.6/5</b>	<b>Good</b>

The 2025 Lerwick Town Centre Health Check demonstrates that the town centre continues to perform well overall, showing resilience and adaptability in the face of ongoing challenges. Key strengths include its high-quality historic environment, strong cultural and community facilities, and a diverse range of independent shops and professional services.

Improvements since the previous audit are evident in areas such as Retail and Professional Services, with the score rising from 2.9 to 4.3 out of 5, and a new Performance score of Very Good. Also, improvements in Physical Environment and Activity are evident in the audit. With Community noticeable in its high scoring with a 4 out of 5 and with a new Performance score of Very Good – all of the above supported by initiatives from Living Lerwick and their Business Improvement District.

However, the health check also highlights areas requiring attention. Persistent issues include limited food retail/grocer shop options, accessibility constraints for disabled users, and a shortage of public spaces and green infrastructure. While vacancy rates remain below the national average, some prominent properties have been vacant for extended periods. Traffic management and ease of movement also remain concerns, particularly during peak visitor periods and cruise ship days. Vacancy rates are at a lower than national average, which is a positive sign of town centre health.

Looking ahead, the findings of this health check will inform the next Local Development Plan (LDP2) and guide strategies for regeneration, investment, and sustainable growth. Opportunities exist to enhance town centre living, improve accessibility, and strengthen the evening economy, while maintaining Lerwick's unique character and heritage.

Collaborative efforts between the Council, Living Lerwick, and community partners will be essential to ensure that Lerwick remains a vibrant, inclusive, and economically resilient town centre for residents and visitors alike.

### Next Steps

The findings of this health check will be used to inform our next Local Development Plan 2 and will impute into relevant policies within the Local Plan.

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.

## 13. References and Further Information

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7. The Place Principle: [Place Principle: introduction - gov.scot](#)
8. Scotland Census – Output Area Data: [2022 output area data | Scotland's Census](#)
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10. Shetland Place Standard – Our Place, Your Say: [shetland-our-place-final-report-v1-3-060126](#)
11. Shetland Islands Council Conservation Area Character Appraisal 2025: [Conservation Areas – Shetland Islands Council](#)
12. Living Lerwick: [Living Lerwick | Business Improvement District - Lerwick, Shetland](#)
13. Short Term Let Register – Shetland Islands Council: [Short Term Lets Register – Shetland Islands Council](#)
14. Lerwick Holiday Homes and Rental - airbnb: [Lerwick Holiday Rentals & Homes - Scotland, United Kingdom | Airbnb](#)
15. Historic Environment Scotland – Buildings at Risk Register for Scotland: [Buildings at Risk Register | Historic Environment Scotland | HES](#)

16. Improvement Service Town Centre Vacancy Rates: [Explore the data | Benchmarking](#)
17. Scottish Assessors' Association (SAA) Rateable Value [Search – Scottish Assessors](#)
18. Shetland Visitor Surveys: [Shetland Visitor Surveys – Shetland Islands Council](#)
19. Shetland Islands Council Ward Crime Map: [Shetland Islands Council Ward Crime Map - Scotland's data on a map](#)

## APPENDIX A - Lerwick Town Centre SWOT Analysis

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• High-quality historic environment and Conservation Area setting.</li> <li>• Compact and walkable town centre with good accessibility.</li> <li>• Strong cultural and community facilities (library, Mareel, museum, Town Hall).</li> <li>• Excellent range of independent and specialist shops.</li> <li>• Good provision of professional services and public sector offices.</li> <li>• Active Business Improvement District (Living Lerwick) driving events and improvements.</li> <li>• Parking provision remains relatively good and mostly free.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Limited food shopping options (loss of butchers and bakers).</li> <li>• Persistent vacant units, some in prime locations.</li> <li>• Constrained physical space for new development.</li> <li>• Narrow street layout limits accessibility and ease of movement.</li> <li>• Poor disabled access to many premises; limited dropped kerbs.</li> <li>• Lack of green infrastructure and public open spaces.</li> <li>• Evening economy still underdeveloped; street quiet after 5pm.</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Promote town centre living (conversion of upper floors into housing).</li> <li>• Regeneration of gap sites and underused buildings (e.g., HNP site, Pitt Lane).</li> <li>• Knab Masterplan and Lanes projects to boost footfall and vibrancy.</li> <li>• Environmental improvements (street furniture, lighting, paving upgrades).</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Continued impact of online shopping and supermarkets diverting trade.</li> <li>• Rising rents and business rates affecting affordability for small businesses.</li> <li>• Long-term vacancies leading to visual decline and reduced vitality.</li> <li>• Traffic and parking pressures during peak tourist season.</li> <li>• Accessibility issues could deter certain user groups.</li> <li>• Seasonal reliance on tourism; risk of uneven economic activity.</li> </ul>



# APPENDIX B – Survey Location Points

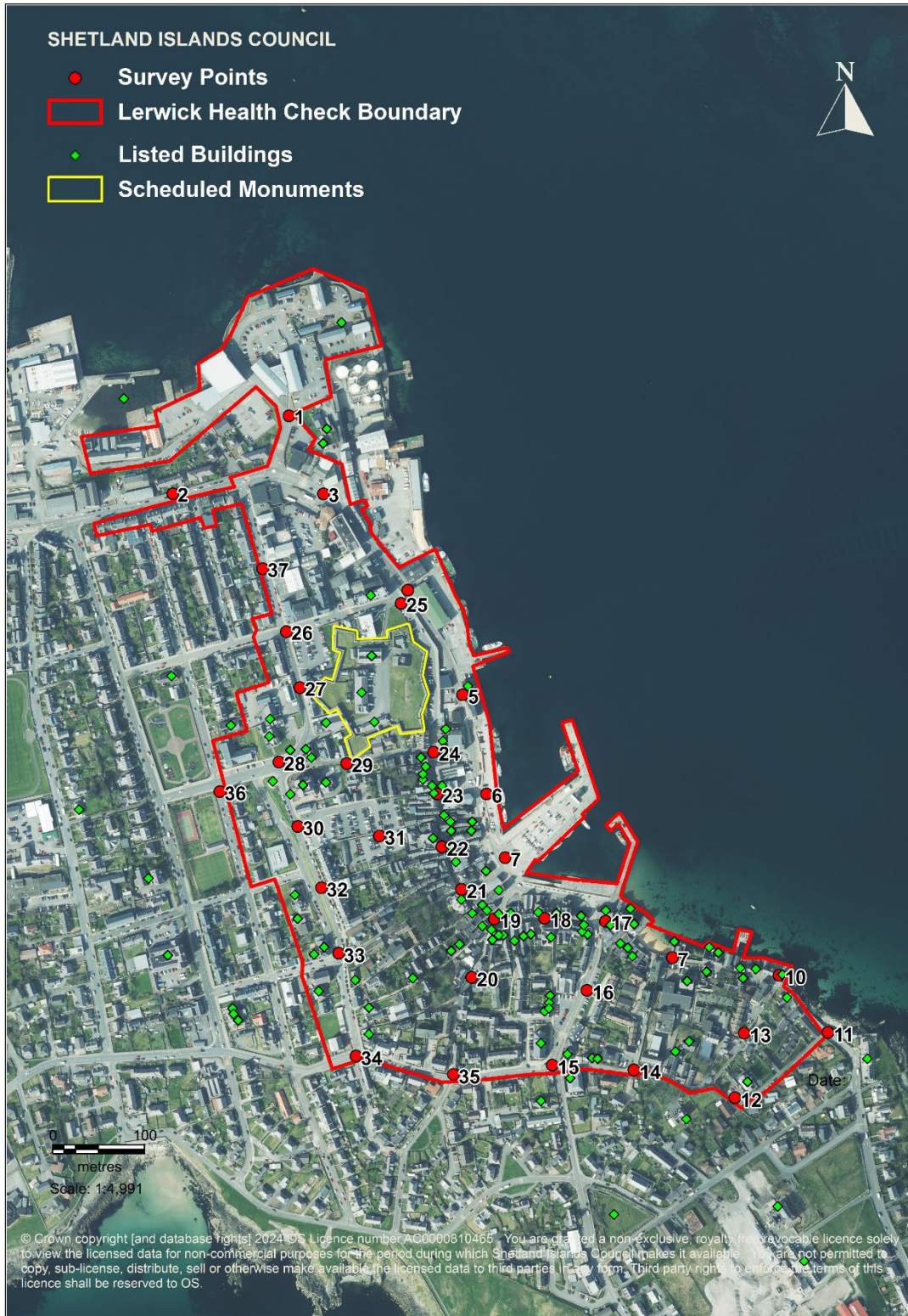


Lerwick Town Centre Health Check

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Date: 17/12/26

# APPENDIX C – Historic Environment and Street Fabric Survey Location Points



## APPENDIX D – Pedestrian Footfall Survey Locations

This was the second 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 and have been compared and contrasted against the 2018 footfall 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.



## APPENDIX E – Health Check Indicators: Scoring Quick Reference Guide

<b>Retail/Professional Services</b>	<b>Activity</b>	<b>Physical Environment</b>
<p><b>2025 score average = 3.7/5</b></p> <p><b>2018 score average = 2.9/5</b></p> <p><b>Performance = Very Good</b></p>	<p><b>2025 score average = 3.8/5</b></p> <p><b>2018 score average = 3/5</b></p> <p><b>Performance = Good</b></p>	<p><b>2025 score average = 3.4/5</b></p> <p><b>2018 score average = 3/5</b></p> <p><b>Performance = Good</b></p>
<p><b>1. Number of Multiple Retailers = 5</b></p> <p>2018 Score = 2</p> <p>Performance = Excellent</p>	<p><b>1. Presence of Cafes, Restaurants and Pubs = 5</b></p> <p>2018 Score = 3</p> <p>Performance = Excellent</p>	<p><b>1. Regeneration Opportunities = 4</b></p> <p>2018 Score = 3</p> <p>Performance = Very Good</p>
<p><b>2. Variety of Specialist and Independent Shops = 5</b></p> <p>2018 Score = 4</p> <p>Performance = Excellent</p>	<p><b>2. Presence of Cultural and Community Facilities = 5</b></p> <p>2018 Score = 4</p> <p>Performance = Excellent</p>	<p><b>2. Visitor Infrastructure (Street Signs and Furniture) = 3</b></p> <p>2018 Score = 3</p> <p>Performance = Good</p>
<p><b>3. Retailer Premiss Demand = 3</b></p> <p>2018 Score = 2</p> <p>Performance = Good</p>	<p><b>3. Leisure and Tourism Facilities = 3</b></p> <p>2018 Score = 3</p> <p>Performance = Good</p>	<p><b>3. Physical Structure = 4</b></p> <p>2018 Score = 3</p> <p>Performance = Very Good</p>
<p><b>4. Diversity of Retail on Offer = 5</b></p> <p>2018 Score = 3</p> <p>Performance = Excellent</p>	<p><b>4. Short Term Let and Holiday Accommodation = 4</b></p> <p>2018 Score = Not Previously Audited</p>	<p><b>4. Appearance of Buildings = 4</b></p> <p>2018 Score = 3</p> <p>Performance = Very Good</p>

	Performance = Very Good	
<p><b>5. Availability of Food Shopping = 2</b></p> <p>2018 Score = 2</p> <p>Performance = Poor</p>	<p><b>5. Properties above Retail/Business = 3</b></p> <p>2018 Score = 3</p> <p>Performance = Good</p>	<p><b>5. Cleanliness &amp; Attractiveness = 4</b></p> <p>2018 Score = 3</p> <p>Performance = Excellent</p>
<p><b>6. Diversity of Services = 4</b></p> <p>2018 Score = 4</p> <p>Performance = Very Good</p>	<p><b>6. Evening/Nighttime Economy = 3</b></p> <p>2018 Score = 2</p> <p>Performance = Good</p>	<p><b>6. Historic Environment = 4</b></p> <p>2018 Score = 4</p> <p>Performance = Very Good</p>
<p><b>7. Scarcity of Charity Shops = 5</b></p> <p>2018 Score = 3</p> <p>Performance = Excellent</p>		<p><b>7. Availability and Quality of Public Space and Green Infrastructure = 3</b></p> <p>2018 Score = 2</p> <p>Performance = Good</p>
<p><b>8. Lack of clustering &amp; proliferation of betting shops, money lending etc. = 5</b></p> <p>2018 Score = 5</p> <p>Performance = Excellent</p>		

<b>Property</b>	<b>Accessibility</b>	<b>Community</b>
<p><b>2025 score average = 3.3/5</b></p>	<p><b>2025 score average = 3.1/5</b></p>	<p><b>2025 score average = 4/5</b></p>
<p><b>2018 score average = 2.5/5</b></p>	<p><b>2018 score average = 2.7/5</b></p>	<p><b>2018 score average = 3/5</b></p>
<p><b>Performance = Good</b></p>	<p><b>Performance = Good</b></p>	

		<b>Performance = Very Good</b>
<b>1. Low Vacancy Rates = 3</b> 2018 Score = 2 Performance = Good	<b>1. Pedestrian Footfall = 3</b> 2018 Score = 2 Performance = Good	<b>1. Attitudes, Perceptions and Aspirations = 4</b> 2018 Score = 3 Performance = Very Good
<b>2. Low Number of Vacant Sites = 4</b> 2018 Score = 3 Performance = Very Good	<b>2. Public Transport Infrastructure and Facilities = 3</b> 2018 Score = 3 Performance = Good	
<b>3. Prime Rental Values = 3</b> 2018 Score = 2 Performance = Good	<b>3. Accessibility of Town Centre = 3</b> 2018 Score = 3 Performance = Good	
	<b>4. Accessibility to Premises = 2</b> 2018 Score = 2 Performance = Poor	
	<b>5. Ease of Movement = 2</b> 2018 Score = 2 Performance = Poor	
	<b>6. Parking on Offer = 3</b> 2018 Score = 4 Performance = Good	
	<b>7. Safety and security = 5</b> 2018 Score = 3	

	Performance = Excellent	
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## APPENDIX F – Town Centre Footfall Surveys – Quick Reference

### 2025 Pedestrian Footfall Surveys

	<b>Tuesday 2<sup>nd</sup> Sept 2025 (Cruise Liner) 1230 - 1330</b>	<b>Wednesday 3rd Sept 2025 1230 - 1330</b>	<b>Friday 5<sup>th</sup> Sept 2025 1230 - 1330</b>	<b>Saturday 27<sup>th</sup> Sept 2025 (Wool Week) 1230 - 1330</b>
<b>North Commercial Street (Harry's)</b>	849		234	312
<b>Central Commercial Street (No. 88)</b>	873		349	519
<b>South Commercial Street (Post Office)</b>	544	186	189	211
<b>Footfall Total Within 1hr Period</b>	<b>2266</b>		<b>772</b>	<b>1042</b>
<b>Average</b>	<b>755</b>	<b>186</b>	<b>257</b>	<b>347</b>

	<b>Tuesday 2<sup>nd</sup> Sept 2025 (Cruise Liner) 1430 - 1530</b>	<b>Thursday 4<sup>th</sup> Sept 2025 1430 - 1530</b>	<b>Friday 5<sup>th</sup> Sept 2025 1430 - 1530</b>	<b>Saturday 27<sup>th</sup> Sept 2025 (Wool Week) 1430 - 1530</b>
<b>North Commercial Street (Harry's)</b>	437		246	315
<b>Central Commercial Street (No. 88)</b>	557	255	405	421
<b>South Commercial Street (Post Office)</b>	349		149	187
<b>Footfall Total Within 1hr Period</b>	<b>1343</b>		<b>800</b>	<b>923</b>
<b>Average</b>	<b>448</b>	<b>255</b>	<b>200</b>	<b>308</b>

## APPENDIX G – Town Centre Vehicle Count Surveys – Quick Reference

### 2025 Vehicle Count

<b>South Commercial Street (Post Office)</b>	<b>Tuesday 2<sup>nd</sup> Sept 2025 (Cruise Liner) 1230 - 1330</b>	<b>Wednesday 3<sup>rd</sup> Sept 2025 1230 - 1330</b>	<b>Friday 5<sup>th</sup> Sept 2025 1230 - 1330</b>	<b>Saturday 27<sup>th</sup> Sept 2025 (Wool Week) 1230 - 1330</b>
<b>Cars</b>	29	34	33	27
<b>Vans/Commercial</b>	8	10	3	2
<b>Disabled Spaces Used</b>	8	4	3	2
<b>Disabled spaces used by vehicles not displaying blue badge</b>	8	4	0	2
<b>Total Number of Vehicles During the Hour</b>	<b>37</b>	<b>44</b>	<b>36</b>	<b>29</b>
	<b>Tuesday 2<sup>nd</sup> Sept 2025 (Cruise Liner) 1430 - 1530</b>	<b>No Wednesday 1430-1530 survey undertaken</b>	<b>Friday 5<sup>th</sup> Sept 2025 1430 - 1530</b>	<b>Saturday 27<sup>th</sup> Sept 2025 (Wool Week) 1430 - 1530</b>
<b>Cars</b>	29		30	34
<b>Vans/Commercial</b>	2		1	0
<b>Disabled Spaces Used</b>	4		5	1
<b>Disabled spaces used by vehicles not displaying blue badge</b>	3		4	0

<b>Total Number of Vehicles During the Hour</b>	<b>31</b>		<b>31</b>	<b>34</b>
<b>Average number of vehicles over the survey times</b>	<b>35</b>			

## APPENDIX H – Breakdown of Units

Business or Unit/Building Type	Total	Percentage of Total
Assembly Buildings/Places of Worship	5	3%
Banking Services	4	2%
Café/Restaurant	15	7%
Charity Shops	2	1%
Cultural/Tourism	4	2%
Estate Agents	2	1%
Financial	6	3%
Guesthouse/B&B	6	3%
Hotels	2	1%
Legal Services	5	2%
Marine Business	1	0%
Other	40	19%
Personal Care/Salons	22	11%
Postal Services	2	1%
Professional Services	21	9%
Public House/Bar & Nightclubs	9	5%
Public Services	17	7%
Retail	66	30%
Takeaway	12	6%
<b>Total</b>	<b>241</b>	

Retail Breakdown - from total of 61 units	Comparison	Percentage of Total
	26	43%
	<b>Convenience</b>	<b>Percentage of Total</b>
	2	3%



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