THE **COMMERCIAL DEVELOPMENT** SCHEME OF THE CITY OF LIÈGE

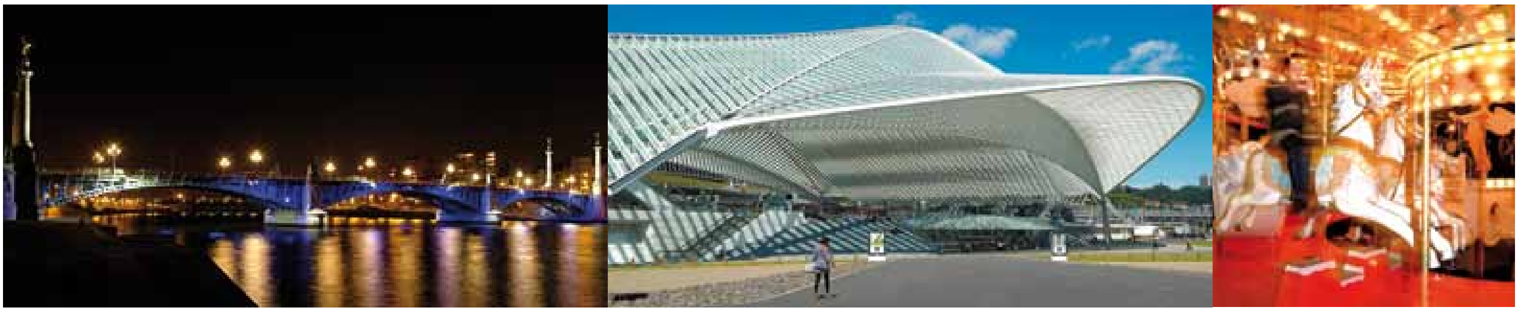
LIEGE THE PLACE

SHOP

Liège

LIEGE THE PLACE 2 SHOP

Liège



THE COMMERCIAL DEVELOPMENT SCHEME OF CITY OF THE CITY OF LIÈGE

LIEGE,
4,800 shops
The biggest pedestrianized network in Wallonia
The 3rd biggest shopping area in Belgium in terms of visits
5 of the 15 biggest shopping centres in Wallonia

The retail trade has always been without any doubt one of the essential functions of Liège.

It plays a major invigorating role in the city's life but also exercises an attractive influence that goes way beyond the confines of the city.

This is why the City of Liège is continuing in its aim to increase the appeal of its retail offering and as a result attract even more customers tomorrow.

A five-person team has carried out a study.

The information gathered highlighted the outline of commercial activity and subsequently enabled the Commercial Development Scheme (CDS) to be drawn up for the City of Liège and approved by the City Council on 31st May 2010.

This tool, a genuine decisional aid for commercial development within the city's boundaries made it possible:
- To conduct in-depth analysis of the commercial apparatus in Liège as well as the demand.
- To create harmonious and balanced development of commercial activity.
- To respond to investors' demands.
- To develop more specific public actions to promote commerce.
- To optimally respond to legislative changes concerning setting up business.

The CDS has defined commercial zones and, for each of them, has set out concrete recommendations with regard to:
- Commercial development
- Mobility
- The urban environment

In this document, you will discover the main findings of the Commercial Development Scheme divided into 4 main chapters:
- **Analysis of the commercial** offering both for the city as well as the urban area.
- **Analysis of demand.**
- **The development strategy and its general and specific recommendations** for each commercial zone.
- **Focus on the hyper-centre.**

Welcome to Liège,

Councillor in charge of economic
and territorial development

« The history of trade is the history of communication between different peoples » (Montesquieu)


MICHEL'S
F·L·E·U·R·S
PIERRE MARCOLINI
CHOCOLATIER
OLIVIERS&CO
RESTAURANT
LE BUCAREST
BOULANGERIE
CROSSET
Le Petit Théâtre

I

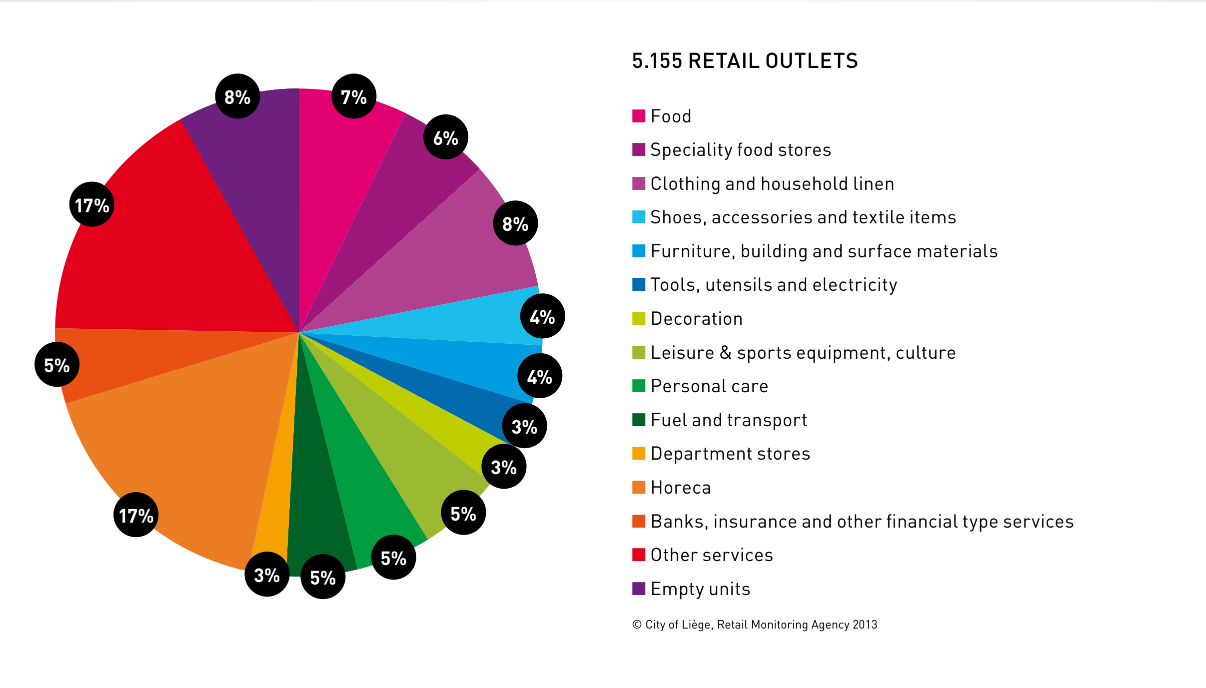
THE RETAIL OFFERING

I.1. THE RETAIL OFFERING IN THE CITY OF LIEGE

I.1.1. The Structure of the retail offering

The **commercial offering** present within the confines of **the City of Liège** totals **4,733 active outlets** for a total of **5,155 retail outlets** (422 empty business units on the market), according to data from March 2013.

This corresponds respectively to **655,547 m² of active commercial floor-space** and **690,860 m² of total sales floor-space**.



I.1.2. The commercial centres

The shops have been grouped into **78 centres** which have been broken down into **three main categories**, which are in turn split into **several types** depending on the nature of the retail offering (size, diversity, etc.):

A. METROPOLITAN CENTRES

Groups of major structures whose influence, in light of the size and characteristics of the offering, exceeds the confines of the conurbation.

A.1 Hyper-centre

In such an element specific to the country's major cities, the retail offering found here combines diversity, distinctiveness and notoriety. As an ideal place for strolling, the hyper-centre of Liège is characterised by an exceptional concentration of shops, the most in Wallonia and the third biggest in the country, which has developed around a pedestrian network of almost 2 km. Although it has to face many competitors of varied nature, it remains not only the symbolic but also very concrete emblem of the city.

A.2 Sub-central shopping centres

These are covered facilities set up from scratch with integrated management and, consequently, control over the retail mix, in which shops and self-service outlets can be found. They are the prime location for national and international brands, proposing a comfortable and reassuring shopping experience.

A.3 Retail park

A temple to mass consumption born of the advent of individual mobility in the golden sixties, this significantly large facility on the urban periphery (with 80,000 m² net sales floor-space) has experienced several uncontrolled expansion phases. Today, in Rocourt, the challenges involve urban integration and mobility.

B. CONURBATION CENTRES

Of more modest individual size with a more sub-regional purpose, these shops make up, however, a veritable retail framework.

B.1 Outlying areas to the centre

These shopping sectors are specific to metropolitan cities, a product of historical urban growth. In fact, they are the result of the first phase of "peri-urbanisation"... at the end of the Middle Ages, when the city expanded past its walls. Although very close to the hyper-centre, today these districts, forgotten for too long because they were seen as unimportant, have witnessed migrations in their populations and activities as well as the commercial offering adapting to this new socio-economic reality.

B.2 Secondary districts

These are also structures produced by urban growth, but mostly in the 19th century. They experienced varied fortunes depending on the local socio-economic backgrounds. These hubs are located in the urban "in-between", too often neglected and mistreated, in particular following the creation of major road networks. By and large, they saw their purpose change towards a more local positioning, whilst still retaining a structuring effect and a major social role.

B.3 Main commercial access roads

Major commercial access roads often combine accessibility, visibility and property availability, making them ideal areas to develop retail outlets. They witness spontaneous development, which can sometimes be chaotic. To seek a balance and pacify them are the challenges of tomorrow.

B.4 Interception points

This term is used to group small structures which have spontaneously developed thanks to good accessibility and residual land or property availability. Often specialist stores, they possess a purpose that swings between local and metropolitan and operate, not on a basis of proximity, but through intercepting potential flows of customers.

C. LOCAL CENTRES

They are made up of retail centres that target customers locally.

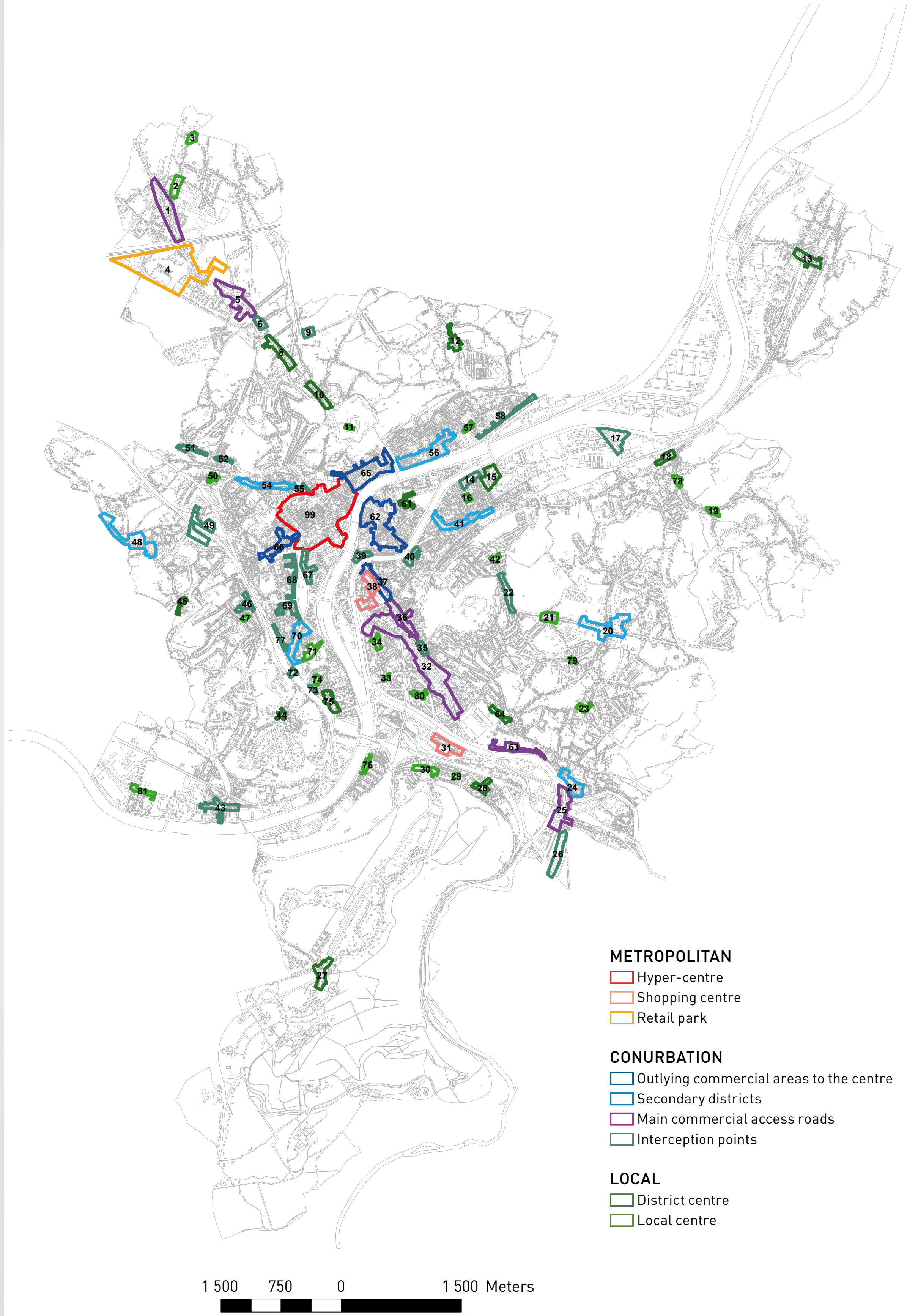
C.1 District centres

These are local structures that nevertheless possess a structural and polarising role at a local scale. On the condition that they propose a quality retail offering, they are probably the best placed to fully benefit from the rediscovery of the virtues of proximity. Such facilities also play a major social role on the scale of their district.

C.2 Local centres

These small, local facilities possess a marginal structural role. They draw, first and foremost, on the potential of districts and good micro-accessibility. Having suffered from the development of new commercial formats and formulas, they can find salvation in specialisation and local services.

Commercial hubs 2010



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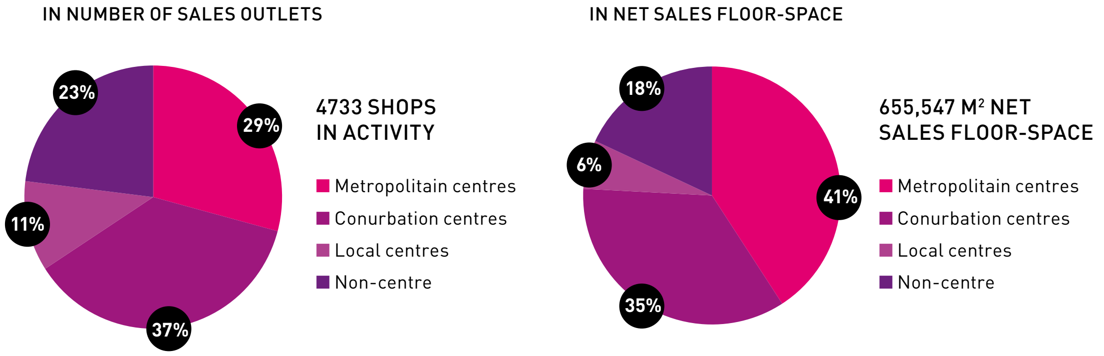
Map N°	NAME	NUMBER OF SHOPS	SALES AREA IN M²	Map N°	NAME	NUMBER OF SHOPS	SALES AREA IN M²
1	Reine Astrid	45	8,858	41	Bressoux	91	7,872
2	Francois Lefbèvre	10	1,082	42	Cardinal Mercier	9	345
3	Saint-Vincent	7	722	43	Solvay	23	3,565
4	Rocourt	122	67,714	44	Cointe	21	1,276
5	Tongres	38	7,535	45	Saint-Gilles	124	9,575
6	Visé-Voie	5	469	46	Laveu	15	2,495
8	Jean de Wilde	24	2,400	47	Wallons	7	270
9	Fosse Crahay	6	420	48	Saint-Nicolas	74	13,145
10	Sainte-Walburge	38	2,450	49	Burenville	5	4,950
11	Citadelle	9	875	50	Baron	6	1,436
12	Thier à Liege	20	2,045	51	Bas-Rhieux	15	986
13	Pont de Wandre	29	3,089	52	Hesbaye	18	919
14	Albert 1er	5	1,645	54	Sainte-Marguerite	69	4,353
15	Droixhe	26	2,208	55	Haute-Sauvenière	10	617
16	Foidart	5	457	56	Saint-Léonard	87	7,432
17	Jupille	12	3,042	57	Pommier	8	384
18	De Visé	20	1,465	58	Cablerie	12	2,593
19	Couvent	7	486	61	Bonnes Ville	20	1,000
20	Bois de Breux	51	11,518	62	Outre Meuse	268	19,175
21	Bassin	10	596	63	Ardennes	12	3,637
22	Robermont	25	2,759	64	Liberté	20	2,392
23	Mauvaises Vigne	11	1,028	65	Feronstrée	173	17,056
24	Chênée	53	4,984	66	Saint-Gilles Haut	26	1,397
25	Station	49	11,790	67	Piercot	26	2,432
26	Sauheid	9	2,105	68	Avroy	28	2,924
27	Sart-Tilman	21	2,116	69	Sainte-Véronique	32	1,743
28	Andrea Jadoule	18	1,269	70	Guillemins	104	11,242
29	Val Benoit	6	220	71	Paradis	10	1,100
30	Vaudrée	13	1,151	72	Guillemins Gare TGV	10	391
31	Belle-Ile	91	30,500	73	Varin	10	615
32	Froidmont	85	39,698	74	Franchises	11	578
33	Square Gramme	6	308	75	Leman	42	3,186
34	Fétinne	15	701	76	Kinkempois	13	745
35	Haute Wez	8	544	77	Plan Incliné	12	1,038
36	Grétry Sud	26	5,780	78	Chafnay	7	782
37	Grétry Nord	77	5,596	79	Belle Flamme	4	300
38	Mediacité	112	29,747	80	Reine Elisabeth	15	729
39	Kennedy	24	1,785	81	Stade Sclessin	10	644
40	Amercœur	18	1,837	99	Hypercentre	1,062	140,132

Groups per category



- The conurbation centres are the most abundant and also have the largest number of sales outlets (37%), confirming the structuring role of this retail framework.
- However, the metropolitan centres only number four in total but account for 41% of the sales area, which displays their dynamogenic function.
- 23% of the retail outlets are not categorised in centres, displaying the dispersed character of the retail offering in the city.

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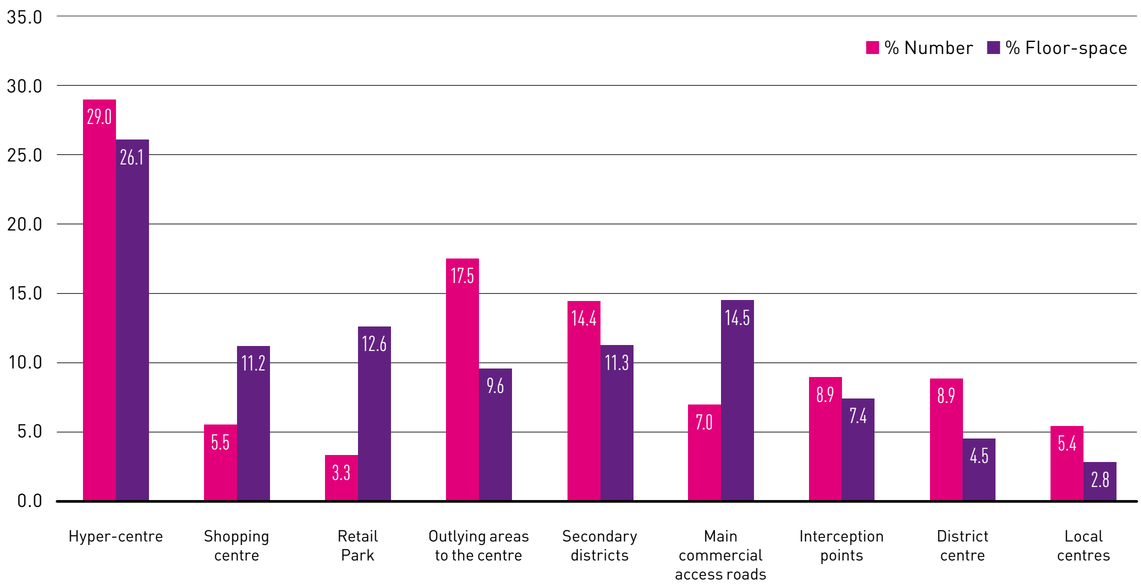
Comparison of the relative importance of different types of centres in number of sales outlets and sales floor-space



- The hyper-centre is the largest of the types (as well as of the centres) with respectively 29% of the sales outlets and 26% of the sales floor-space. Despite strong intra-district contrasts, it serves as a veritable driving force for the rest of the retail apparatus in Liège.
- Next, in number of retail outlets, come the outlying areas to the centre, with 17% (but less than 10% in floor-space) and, in sales floor-space, main commercial access roads with 14% (but only 7% of the number of outlets).

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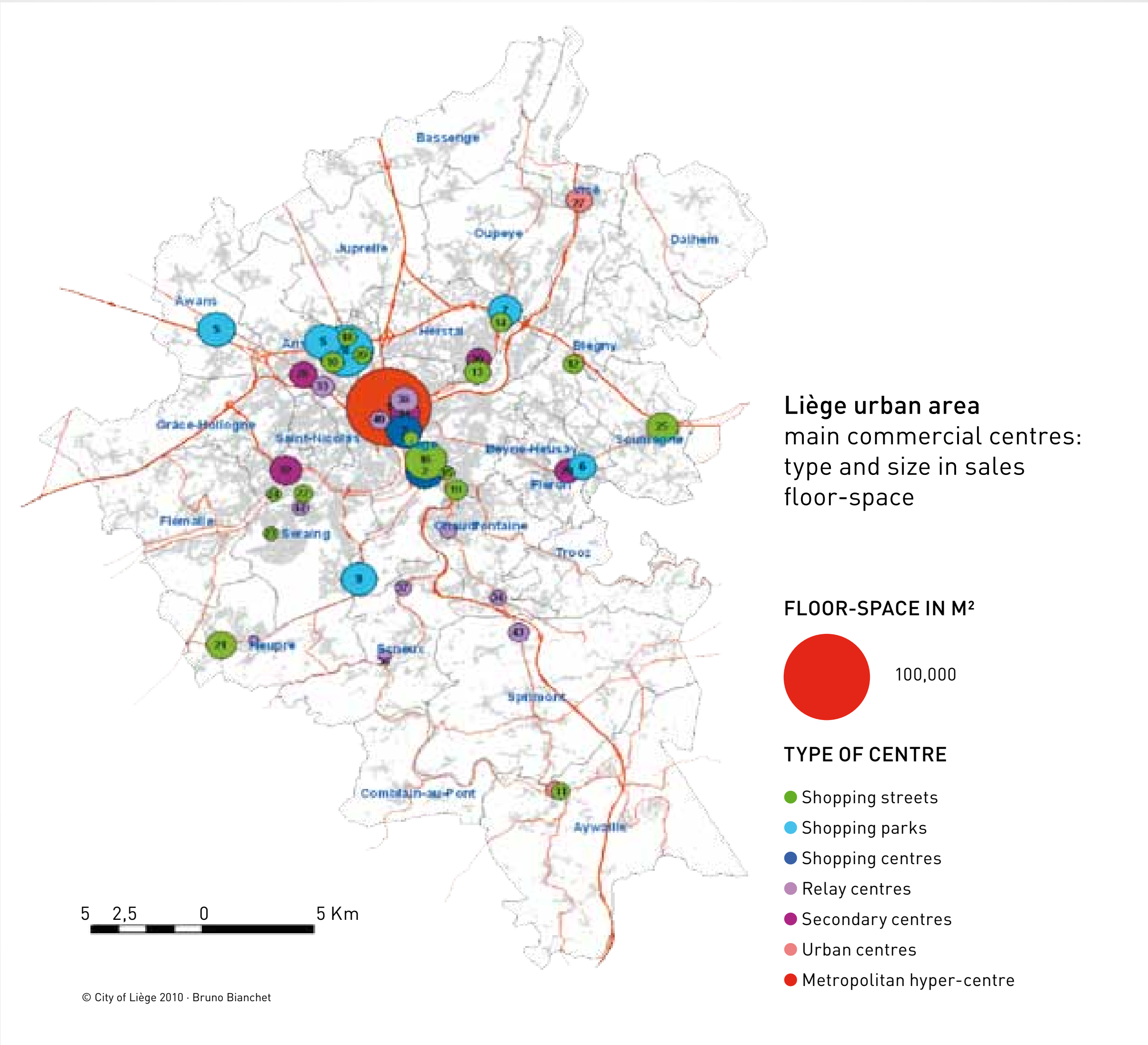
I.2. THE RETAIL OFFERING ON THE SCALE OF THE CONURBATION

The City of Liège is the centre of a conurbation (with its suburbs) that is two (or even three) times more populated. Logically, its retail apparatus is at the heart of an offering that extends considerably further than the city limits.

In addition to the previously defined types for the retail offering in Liège, there are three new types of retail centres featured on the general map: urban centres (traditional facilities that correspond with towns placed on a lower rung of the urban ladder, sometimes with a significant requalification of their centre that combines user-friendliness with proximity), traditional secondary centres (structures that are characteristic of major conurbations, mainly made up of traditional shops with a broad range of facilities that play, or played, the role of a relay to the city centre) and relay centres (more modest sized hubs that nevertheless, on a local scale, play a major structural role).



The dense and varied commercial framework of the Liège conurbation chiefly develops along the major urban arterial routes leading to the city centre, or near to roads that bypass the urban centre, especially in the north of the conurbation (Rocourt, Ans, Hognoul).

In spite of this context, the influence of Liège is decisive, boasting as it does 54% of the sales units and 54% of the sales floor-space.

The consolidation of centres in the second ring promoting the return to a local way of life, as well as the continuing development of high floor-space consuming amenities in the broad outskirts of the city, are both challenges to be considered by a policy concerning the commercial function on the scale of the future Liège urban community.


MARBAISE

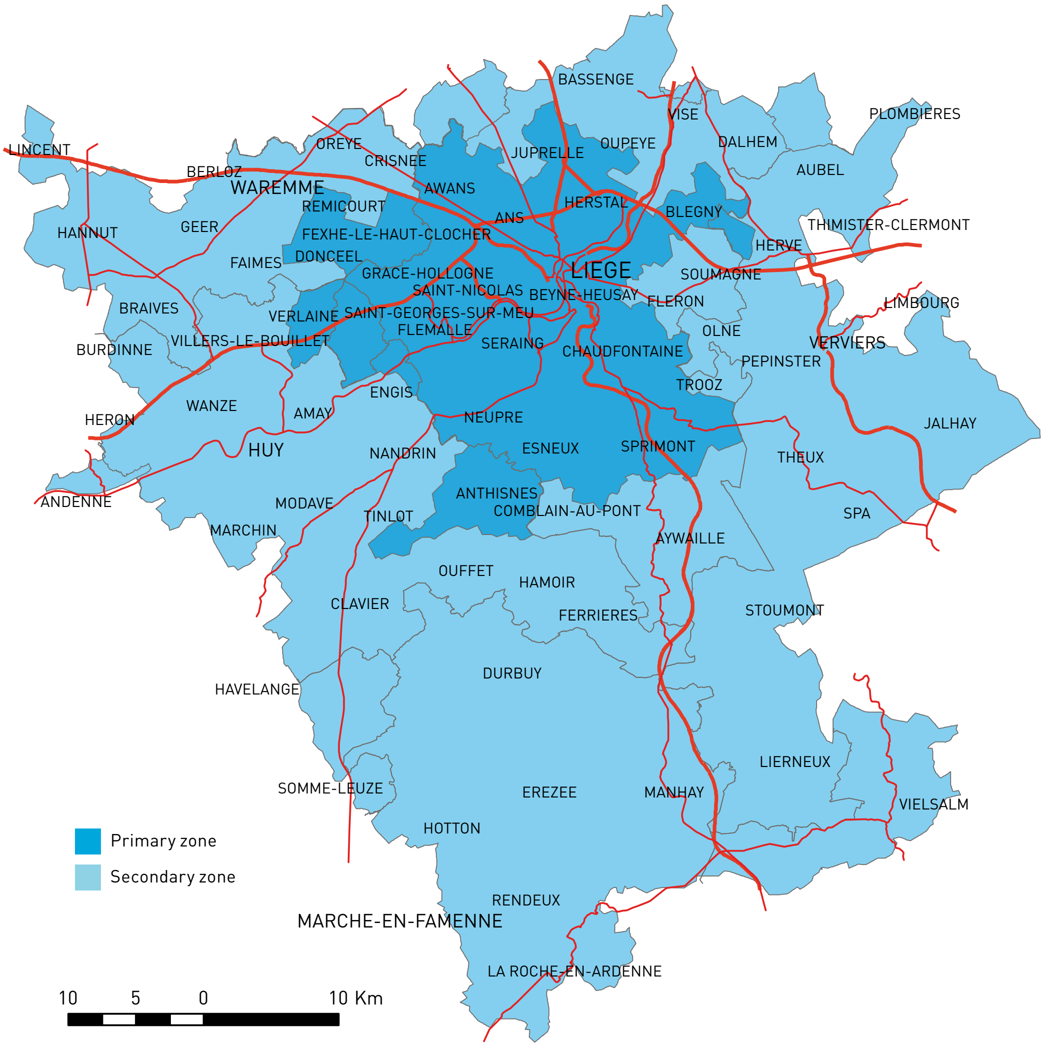
II

THE DEMAND

Liège city centre possesses a considerable zone of influence (with more than 920,000 inhabitants), by far the biggest of the Walloon cities and probably the third biggest in Belgium.

The zone of influence contains a wide range of socio-economic profiles, including the well-off and the disadvantaged.

Liège hyper-centre – Zones of influence



© ULg – KUL survey updated City of Liège 2010

ESTIMATION OF THE ZONE OF INFLUENCE

	POPULATION IN 2008	NUMBER OF HOUSEHOLDS IN 2008	AVERAGE SIZE OF HOUSEHOLD	CHANGE IN POPULATION 2003 - 2008	AVERAGE EARNINGS DECLARED IN 2006
Primary zone	513,467	241,274	2.12	1.70	21,721
Secondary zone	412,953	171,160	2.38	3.15	22,943
TOTAL	**926,420**	**412,434**	**2.22**	**2.34**	**22,266**

Following a long demographical decline that started well before the merger of municipalities in 1978, Liège has recorded, since 2001, a rate of population growth greater than that of its urban area.

Furthermore, as is the general trend in most western European cities, despite the demographical decline of Liège that dates back to before 2001, the city has recorded a continual increase in the number of households combined with a general reduction in their average size.

The average earnings per household remains lower than the values displayed for the urban area, illustrating as such that there is an old movement of "rurbanisation" of the population. Once more, recent trends show a return to the city of well-off middle classes which is to be correlated with the improvement in the quality of life in urban areas but also with the increase in cost of public and private transport.

SOCIO-DEMOGRAPHICAL BASIS

	POPULATION IN 2011	CHANGE IN POP. 2001-2011 IN %	NUMBER OF HOUSEHOLDS IN 2010	AVERAGE EARNINGS PER HOUSEHOLD IN 2009 IN € PER YEAR
Liège	194,657	5.5	101,385	21,502
Liège urban area	609,392	4.1	280,898	24,380

Detailed **qualitative analysis** of the **catchment area** was undertaken in the study devoted to the demand in the commercial hyper-centre of Liège.

The observations made come from a series of **surveys** conducted in **different areas** surrounding the hyper-centre and according to **various methodological criteria** (survey in competitor centres in the city outskirts, direct survey at the homes of Liège's inhabitants, telephone survey in the small urban centres of the Liège zone of influence).

*The results showed that **diversity, ambiance and proximity** are the **major advantages** of the city centre, and that **parking, cleanliness and security** are its **main weaknesses**.*

III

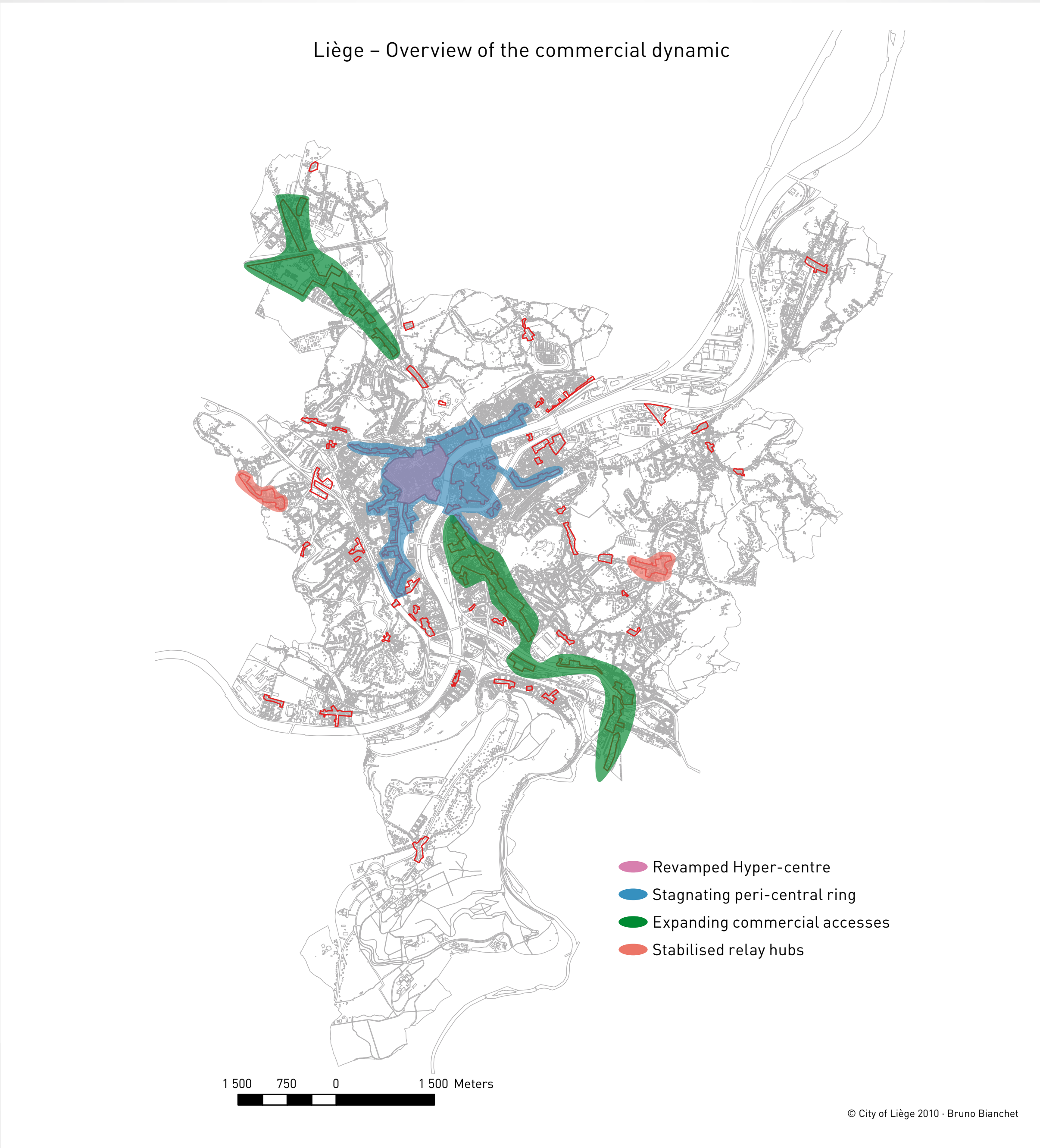
RECOMMENDATIONS OF THE RETAIL DEVELOPMENT PLAN

III.1. THE COMMERCIAL DYNAMIC

As a result, an ***overview of the commercial dynamic*** has been defined and is based on ***6 major sectors of the framework***:

- The hyper-centre under renewal.
- The stagnating peri-central ring.
- The two expanding commercial accesses.
- The two stabilising relay hubs.

The ***city's strategy of intervention in the commercial fabric*** is based on this spatial overview.



III.2. THE DEVELOPMENT AND INTERVENTION STRATEGY FOR THE COMMERCIAL FABRIC

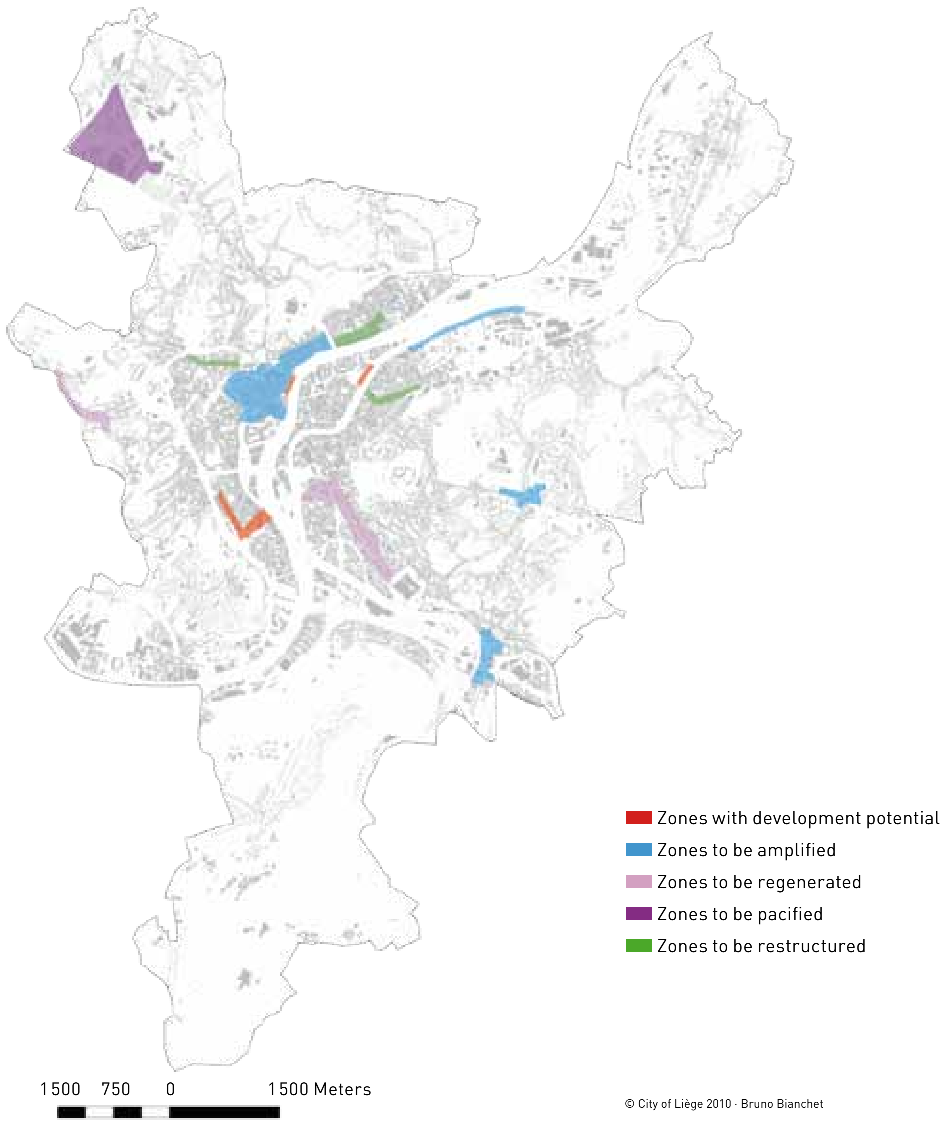
5 zones of priority intervention have been defined, taking account of the commercial profile, the dynamism, the geographical situation and the functional role of the main centres or groups of centres recognised, but also the presence of several "emblematic urban sites":

- Zones with development potential
- Zones to be amplified
- Zones to be regenerated
- Zones to be restructured
- Zones to be pacified

The City of Liège's ***retail policy*** naturally ***favours*** the requalification of the ***hyper-centre sector*** which, through its size and diversity, represents the "calling card" for Liège's retail offer.

The favourable development of an ***economic sector*** made up of more than ***13,000 jobs in Liège*** is one of the final reasons behind the necessity to increase the driving role of the city authorities with regard to retail policy.

Liège · Proposition of a development and intervention strategy for the commercial fabric.



III.3. THE RECOMMENDATIONS

Based on the detailed analysis of Liège's retail apparatus, the RDP has enabled ***general and specific recommendations***.

III.3.1. The general recommendations

This municipal, sectorial and spatial policy has lead to the definition of ***general recommendations*** for ***the development of retail***:

- Dissuade businesses from setting up outside existing centres.
- Promote the filling in of unused land/property in existing centres.
- Encourage recycling of property within existing centres.
- Confirm and promote priority development or intervention zones in the commercial fabric.
- Prevent the creation of any new facilities of significant size.
- Improve the urban environment and mobility.
- Dress up empty retail units.
- Combat the inertia of certain property owners.

III.3.2. The specific recommendations

Furthermore, specific recommendations have been defined for each type of centre, in particular:

For peri-central shopping centres:

- Limit the changes and developments necessary for maintaining the respective dynamics of the facilities.
- Further integrate the city's two shopping centres in the urban dynamic (marketing, events, etc.).

For the Rocourt Retail park:

- Encourage the repositioning of an ageing concept, which faces strong competition today.
- Discourage new extensions outside the existing buildings.

For the outlying areas to the centre:

- Encourage the upkeep of a comprehensive retail offering that meets most of the usual needs of consumers.
- Support recycling as housing of retail units in marginal locations.

For the secondary districts:

- Promote and support concentration of the offering on the densest zones.
- Promote the creation of small "local commercial driving forces".
- Support and promote the modernisation of ethical business and trade specific to certain centres.

For the arterial route structures:

- Prevent tentacle-like developments.
- Limit developments to reclaiming unused land or property.
- Direct certain high floor-space consuming entities (automobile, building materials, etc.) to specific places (zones on the city's outskirts or sites awaiting reconversion).

For interception points:

- Prevent tentacle-like developments and stop them creeping into residential districts.
- Amplify existing themes insofar as they are compatible with the urban context.

For district centres:

- Encourage the density and compactness of structures.
- Support local participatory dynamics (promotion and events).

For local centres:

- Encourage the density of structures (and avoid dilution into housing).
- Stop isolation of shopkeepers.

III.3.4. The "regulatory" purpose of the Retail Development Plan underpins the principle of " URBAN COMMERCIAL ZONING"

Within the centres:

COMMERCIAL ZONING PER TYPE OF CENTRE		
CENTRES	LARGE FOOD-SELLING SUPERMARKETS	LARGE NON-FOOD SELLING SUPERMARKETS
Hyper-centre	No	Yes, within existing buildings
Shopping centre	No	Yes, within existing units
Retail park	No	Yes, within existing buildings
Outlying areas to the centre	No	Yes, within existing buildings Maximum: 1,500 m²
Secondary districts	Yes, within existing buildings Maximum: 800 m²	Yes, within existing buildings Maximum: 1,500 m²
Main commercial access roads	No, unless an empty building is recycled Maximum: 800 m²	Yes, within existing buildings and unused land/property Maximum: 2,000 m²
Interception points	No	Yes, within existing buildings and unused land/property Maximum: 2,000 m²
District centres	Yes, within existing buildings Maximum: 600 m²	Yes, within existing buildings Maximum: 300 m²
Local centres	No	No

IV

A SPECIFIC CASE:
FOCUS ON THE HYPER-CENTRE

IV.1. ANALYSIS OF THE OFFERING

Although we are in the presence of a commercial continuum, we have broken it down into 11 distinct but adjacent hubs. They form a veritable jigsaw whose pieces, although next to each other, can display stark contrasts.

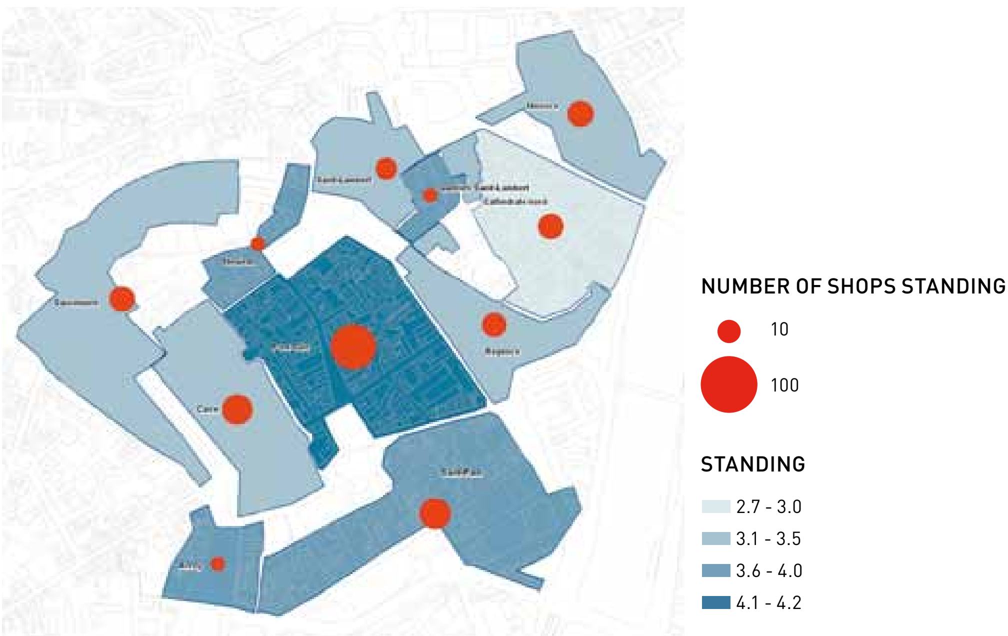
In addition to usual indicators (nature of sales outlets, size of sales nodes, rate of commercial vacancy), a specific parameter makes it possible to gauge the wealth but also diversification of this very contrasted retail area: the standing. It is a qualitative evaluation, conducted at sales outlet and product range level.

GLOBAL CHARACTERISTICS OF THE HYPER-CENTRE

	NUMBER OF SALES OUTLETS	IN %	SALES FLOOR-SPACE	IN %	AVERAGE SIZE PER UNIT	% EMPTY
Avroy	20	2	1,495	1	75	19
Carré	118	11	14,593	10	124	18
Cathédrale nord	87	8	7,560	5	87	47
Galeries Saint-Lambert	30	3	23,090	16	770	3
Neuvice	99	9	7,891	6	80	13
Opéra	23	2	1,751	1	76	12
Pont d'Ile	327	31	40,168	29	123	8
Régence	83	8	7,502	5	90	15
Saint-Lambert	50	5	13,040	9	261	18
Saint-Paul	150	14	16,193	12	108	11
Sauvenière	75	7	7,591	6	101	19
Total	**1,062**	**100**	**140,874**	**100**	**132**	**17**

Source : City of Liège, Retail Monitoring Agency - 2012

Liège centre – Commercial hubs: importance of the offering and average standing



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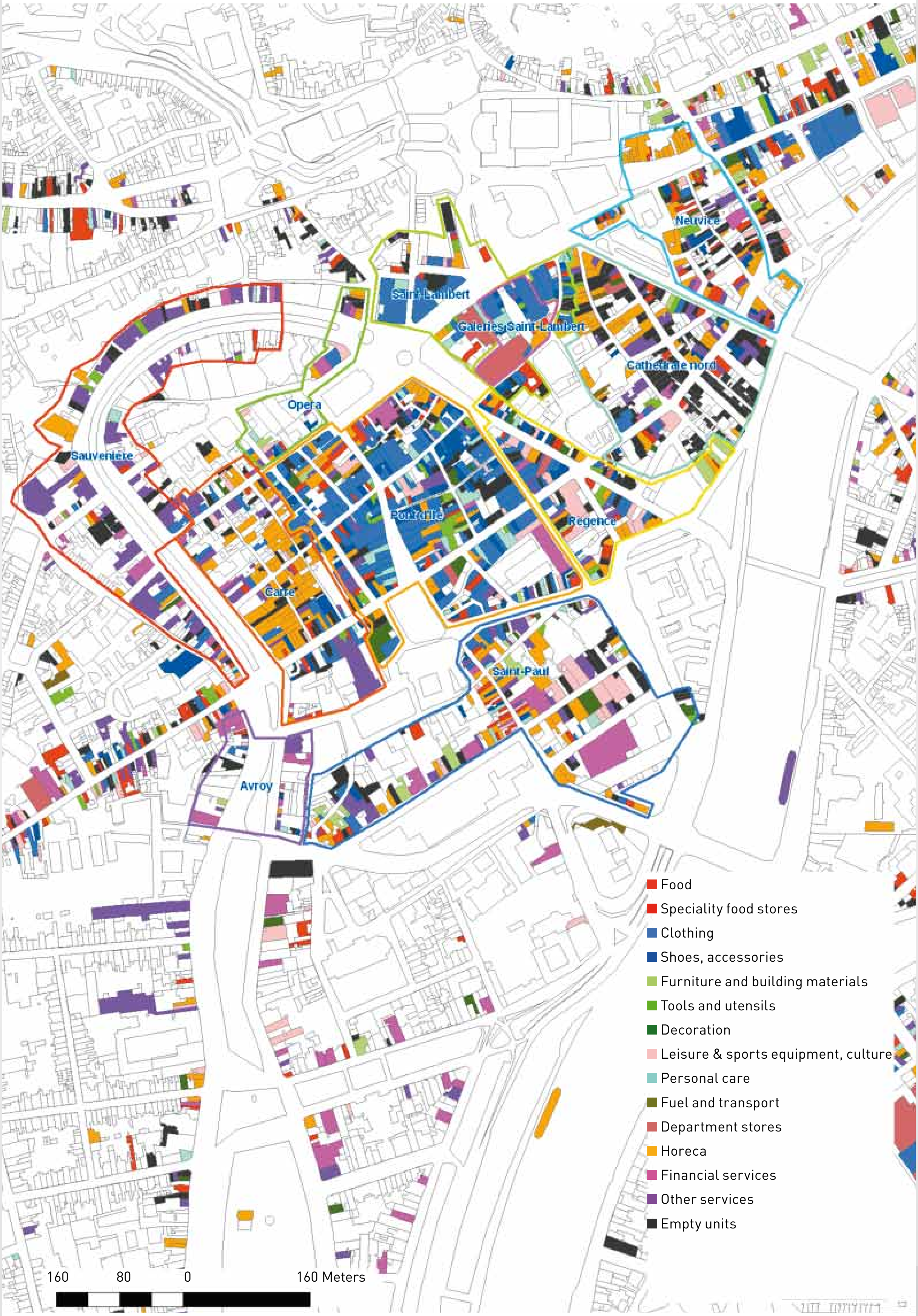
Liège hyper-centre · commercial hubs



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With more than 150,000 m² of overall sales floor-space, the hyper-centre remains, in spite of strong competition both inside and outside Liège, the leading concentration of shops in the city (and even in Wallonia). Beyond this overall vision, the contrasts, in terms of hubs and even streets, are very considerable and require special attention from the city authorities.

Such attention should be borne out by interventionist measures, backed up by targeted action research, which is sometimes pioneering in its outlook.

CREASHOP

This is the case of the partnership agreement entered into by the City of Liège and a business creation support structure, ASBL Job'In, to create 4 ground-floor shops underneath several renovated apartments in buildings acquired by the city's property management agency.

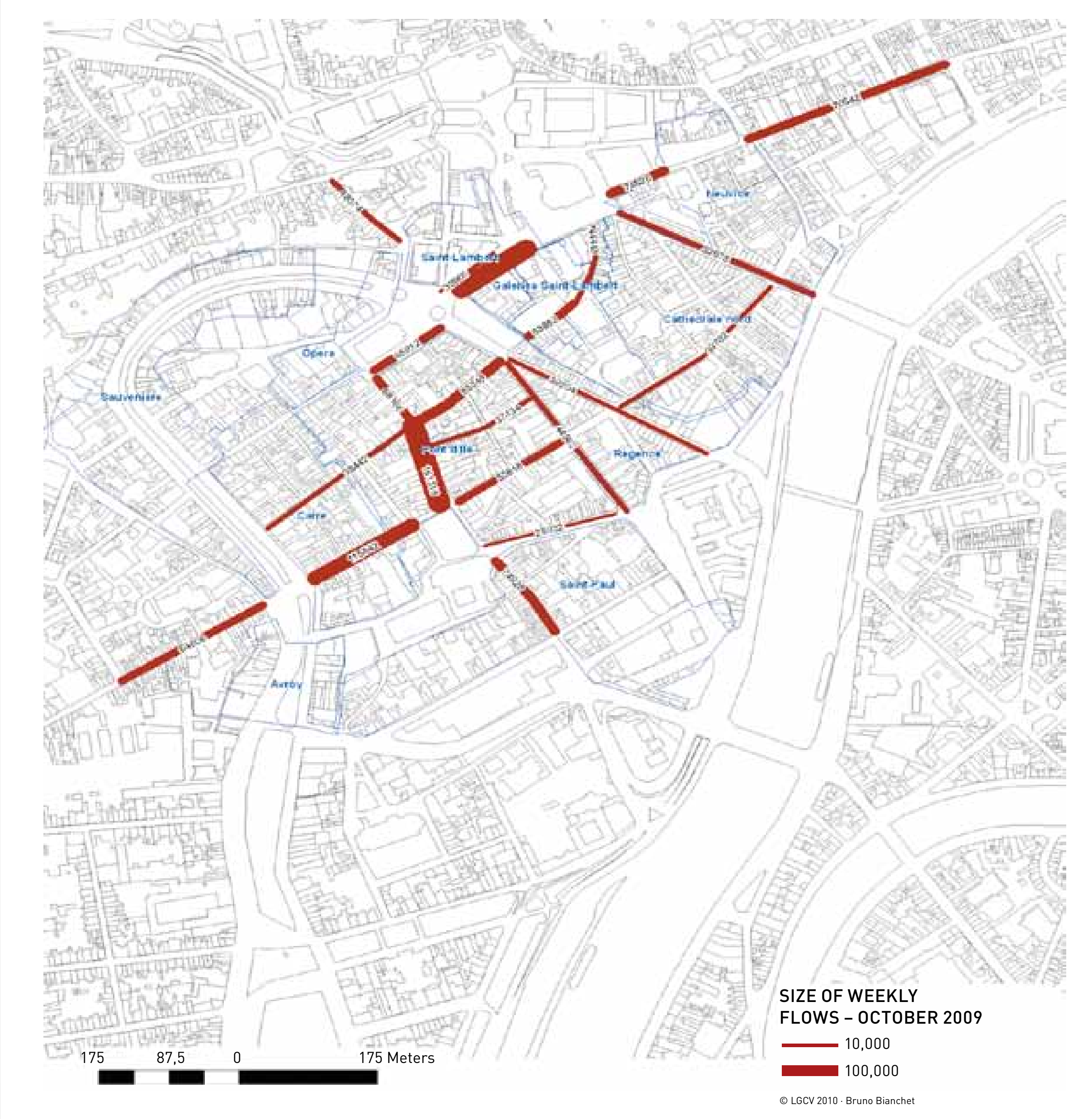
With a twin focal point template (the Cathedral and Saint-Lambert squares) that is particularly attractive, the commercial hyper-centre of Liège boasts an extremely diversified offering. It also can point to, in certain sectors, a superior level of quality on a city-wide scale (especially in the personal equipment sector).

Whilst certain units display a rate of commercial vacancy that is higher than the average (and a similar amount of commercial opportunities), the many different paths through the pedestrianized area and its cultural environment provide the hyper-centre of Liège with a friendly atmosphere and strong identity.

IV.2. Pedestrian flows and movements in the hyper-centre

With a weekly flow of more than 160,000 potential customers for the most visited sector (Vinâve-d'Ile), the hyper-centre of Liège boasts extremely high visitor numbers, certainly the highest in Wallonia, and is in the third in Belgium, after Brussels and Antwerp.

(*) 200,000 according to the Fastignon study of December 2012



IV.3. GENERAL RECOMMENDATIONS FOR THE HYPER-CENTRE

- Maintain or even amplify the function of "metropolitan driving force".
- Maintain or even amplify the level of quality and the diversity of the offering.
- Maintain or even amplify the differentiation in comparison to the city's outskirts.
- Improve the circulation of pedestrians (flows, safety, signposting).
- Reinforce the appeal by encouraging the arrival of original or innovative concepts.
- Revamp the brand image, specifically with regard to people from Liège.
- Give greater distinction of the different nodes, in particular by signposting and defined routes.
- Demystify the issue of parking.

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LIEGE THE PLACE
SHOP

Liège